



ENGAGEMENT  
READINESS  
**MONITOR**



# Engagement Readiness Self-Assessment Tool

*Step-by-step guide*



## 1. PREPARATION

### 1.1. Commit to the self-assessment process in your Higher Education Institution

Take the decision to complete the self-assessment and to follow the customized roadmap emerging from it. You will need to dedicate resources to the process.

### 1.2. Gather a group, which will represent the evaluated institution (or unit) in the self-assessment

This group should be aware of the structure and current situation of the HEI and agile enough to gather up for a discussion / workshop.

In the best case, the group would consist of the following professionals:

- University senior management and leadership who drive and develop institution-wide vision, mission and strategy for external engagement and collaboration (Rectorate, Vice-Rectorate for Engagement, Corporate Relations/Innovation, Senior Management of TTO/KTO and engagement departments, etc.)
- University professional (non-academic staff) and academic staff who practically implement and support/facilitate university-wide external engagement and collaboration vision, mission and vision
- (optional) Selected university academic staff from various faculties and departments who are at the forefront of engagement practices.

### 1.3. Organize a workshop / discussion

Completing the survey will take at least two hours, but depending on the depth of the conversation, probably even more. You can decide to organize multiple sessions, in each of which you complete and save parts of the survey.

Reserve a room or workspace where participants could discuss in a free manner and document the observations conveniently. To access and complete the self-assessment, you will need an Internet connection.

## 2. IMPLEMENTATION

The Engagement Readiness Self-Assessment Tool is a survey developed in accordance with the [Engagement Readiness Self-Assessment Framework](#) and technically implemented in [Webropol](#).

### 2.1. Get organized

Decide on the rules of the discussion / workshop, i.e., when is one allowed to talk, when a decision is reached, etc.

Choose members of the group, who will:

- lead the conversation
- keep track of time
- fill in the answers in the online survey on behalf of the group
- document the observations on behalf of the group

## 2.2. Read the instructions on the website

All important instruction for the Self-Assessment Tool are to be found on the Engagement Readiness Monitor website: <https://engagementready.eu/assess-your-engagement-readiness-online-2/assess-your-engagement-readiness-online/>.

## 2.3. Open the Self-Assessment Tool and a documentation tool

Link to the Engagement Readiness Self-Assessment Tool in Webropol:

<https://link.webpolsurveys.com/S/20B950AB0F76FD82>.

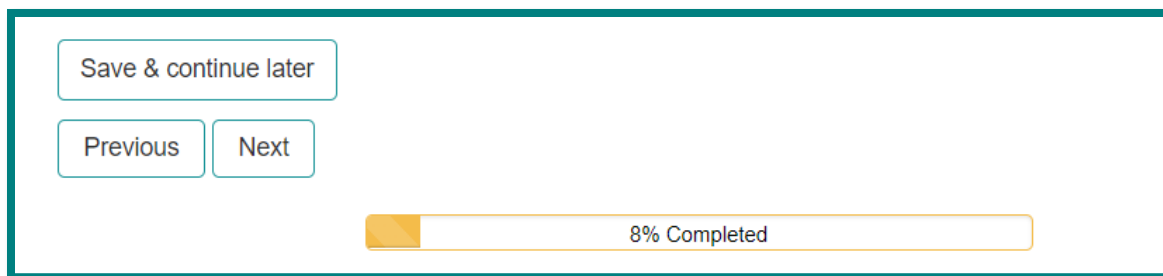
Link to the online documentation tool on the Engagement Readiness Monitor website:

<https://engagementready.eu/document-the-self-assessment-process/>.

For the documentation of the self-assessment process, you can also choose another documentation tool, for example simply a text editor application (such as Microsoft Word) or a form / template of your Higher Education Institution.

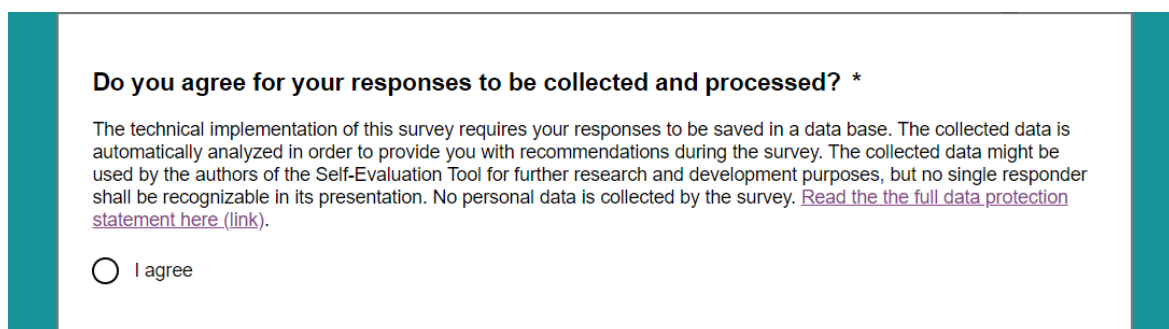
## 2.4. Start filling the survey

Note that on the bottom of each page of the survey you will find a progress bar, navigation buttons, as well as a possibility to end the current session and save the survey for later completion.



The screenshot shows a survey interface with a teal border. At the top left, there is a button labeled "Save & continue later". Below it are two buttons labeled "Previous" and "Next". At the bottom center, there is a progress bar with a yellow segment on the left and the text "8% Completed" to its right.

To undertake the survey, first you need to agree to the practice of data collection.



The screenshot shows a consent form with a teal border. The question is "Do you agree for your responses to be collected and processed? \*". Below the question is a paragraph of text: "The technical implementation of this survey requires your responses to be saved in a data base. The collected data is automatically analyzed in order to provide you with recommendations during the survey. The collected data might be used by the authors of the Self-Evaluation Tool for further research and development purposes, but no single responder shall be recognizable in its presentation. No personal data is collected by the survey. [Read the the full data protection statement here \(link\)](#)." Below the text is a radio button followed by the text "I agree".

Fill in the information of the HEI being assessed:

**The type of your organization:**

University  
 University of Applied Sciences / Polytechnic University  
 Other, *what?*

**Fill in the information about the organization or unit being assessed: \***

Name

Country

## 2.5. Proceed with filling the survey by alternating between the question and recommendation phases

### Question phase:

Information about the dimension being assessed

**Internal awareness of practices, barriers, drivers and assets (Academic staff)**

This dimension refers to an institution's staff awareness and knowledge with regards to the current state of external engagement activities, resources and support available at the institution, drivers and barriers affecting external engagement.

**Academic staff at our institution are aware of individual and group engagement and collaboration activities by their fellow academics:**

Not at all  Very well

**Academic staff at our institution are aware of the resources and support available for external engagement and collaboration provided by the institution:**

Not at all  Very well

Assessment questions

Note that you need to move the slide switch to activate it, even if your chosen value is 1. Its color then changes from grey to green.

**Recommendation phase:**

Before you continue with the survey, here are a few recommendations based on your answers. Save the tools you wish for later use by selecting them. If you don't want to select any tool, proceed to the next page.

[State of University-Business Cooperation on Europe \(Report\)](#)

Save for later

[Online Thematic Workshop on the University-Industry Collaboration \(Video\)](#)

Save for later

Save the tool for later use if you find it relevant. Only saved tools will appear in the summary report.

Recommended Engagement Readiness Tools: You can open the links right away if you wish.

At the end of the survey, produce a summary report

Press the Submit button on the last page of the survey.

Save & continue later

Previous **Submit**

100% Completed

A summary report is automatically generated. It contains instruction for use, Engagement Readiness scores for the whole survey and its separate sections, as well as a list of all saved tools.

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Summary page:  
Engagement Readiness Self-Assessment

This is a report of the self-assessment you performed. It contains the Engagement Readiness score of the higher education institution at the time of assessment, followed by a set of tools customized for your use based on your answers to the Self-Assessment survey.

**How to read the Engagement Readiness score:** You will find a report of the overall score as an average of the scores of single questions, as well as the scores by section. Each section is indicated by its name and target (academic staff, professional staff, institution). The color indicates whether a section needs to be developed further or has a sufficient level of Engagement Readiness. This part of the report will help you identify the most important development areas of Engagement Readiness at your institution.

**How to read the Engagement Readiness tool list:** You will find a list of all the tools that were recommended to you and you have saved during the survey. Each tool is indicated by its name and type, and is presented as a link to the tool on the Engagement Readiness Monitor website. The tools are presented by section. If a section is empty, you haven't saved any tool within it. Please, note that some of the tools might be recommended to you repeatedly in the context of different sections.

**How to edit and save this report:** You can go back to the survey and edit your answers (find the button below). Please, save the report as a PDF file or send it via email to make it available for later use. *Once you close this page, you cannot view it again.*

To browse through the complete Engagement Readiness Toolkit, please, visit this website:  
<https://engagementready.eu/toolkit-to-engagement-readiness/>.  
You will be automatically redirected to the website after closing this page.

Evaluated organization or unit: **Test Name**

Date of completion of the self-assessment: **27.09.2022**

You can save the report as a PDF file or send it to your email address.

Instructions of the report

The name of the evaluated HEI and the date of completion of the self-assessment appear here.

Sections by score:	
to be further developed	
on a sufficient level	
Average Score	
Engagement Readiness - overall score	3.7
Average Score	
Internal awareness of practices, barriers, drivers and assets (Academic staff)	5

Score for the whole survey

Score for a single section

**Internal awareness of practices, barriers, drivers and assets (Professional staff)**

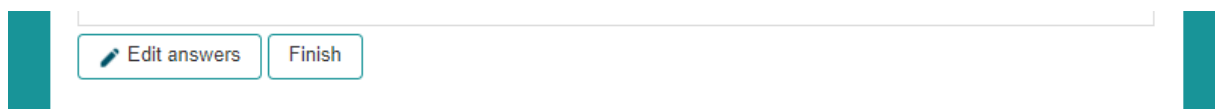
- Martel Innovate success strategy: Substance, not spin (Blog)**  
Save for later
- Online Thematic Workshop on the University-Industry Collaboration (Video)**  
Save for later
- Student Feedback as an Indicator of Engagement (Case study)**  
Save for later

The tools of a dimension saved for later use appear in the summary report as links to the tools on the Engagement Readiness Monitor website.

At the bottom of the report page you will find two buttons.

Use the Edit answers button if you wish to adjust your answers or saved tools. The summary report will change accordingly.

**ATTENTION:** Once you press the Finish button, you can't edit your answers or open the summary report anymore, so make sure to save the report before that.



## 3. FOLLOW-UP

### 3.1. Delegate the familiarization to the suggested tools to different key actors across your organization

The decision for this could be taken within the self-assessment group or by the management of the HEI. For using the toolkit, use the instructions given on its web page:

<https://engagementready.eu/assess-your-engagement-readiness-online-2/toolkit-to-engagement-readiness/>.

### 3.2. Repeat the self-assessment

In a while, you can repeat the self-assessment in order to record changes / improvements in HEI's engagement readiness.

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