

# Change Agency & Public Engagement

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## Introduction

Embedding a positive culture of public engagement with research at higher education institutions has been the focus of investment from Research Councils UK, firstly with the [Beacons for Public Engagement \(2008-2012\)](#) and most recently with the [Public Engagement with Research Catalysts \(2012-2015\)](#). *Change Agency & Public Engagement* brings together the experience of people from the eight universities participating in the Public Engagement with Research Catalysts programme and outlines the various skills, knowledge, attributes, and activities core to their change agent roles.

## Public Engagement with Research Catalysts (2012-2015)

Eight institutions (University of Aberdeen, University of Bath, University of Exeter, Institute of Education, University of Nottingham, Open University, Queen Mary – University of London, and University of Sheffield) were funded through the Catalyst programme to:

- Create a culture where excellent PER is formalised and embedded through:
  - strategic commitment to public engagement;
  - integration of public engagement into core research activities, including measuring quality and impact of PER activities;
  - reward and recognition of researchers and staff involved in public engagement;
  - encouraging and supporting researchers and staff at all levels to become involved (e.g. by building capacity for public engagement amongst researchers);
  - creating networks within institutions to share good practice, celebrate their work and ensure that those involved in public engagement feel supported;
  - contributing to a wider network supportive of public engagement including the National Coordinating Centre for Public Engagement (NCCPE), other recipient universities and the wider higher education community
- Build on experience to develop best practice that recognises the two-way nature of PER

## Change Agent

Towards the end of their respective projects, individuals from across the Catalyst institutions gathered to reflect on their experiences. Reflections grew from the following shared starting points:

- a) The remit of the Catalysts was one of **culture change** and specifically, to help institutions to embed PER within policies, procedures and practices. Through taking part in the Catalyst programme, the institutions involved had demonstrated that they were open to change;
- b) Those employed by the Catalysts were **change agents**. Their location varied from institution to institution – for example, some were based in Marketing & Communications and others in Research Development Services – but they all shared a remit to work across their institutions to foster change;
- c) As change agents, those employed on the Catalyst programme **routinely facilitated collaborations** of varying scales, durations, and remits both within and without their institutions.

## Are you a Change Agent?

In *Change Agency & Public Engagement* we share the outcomes of these reflections and through several exercises invite public engagement professionals tasked with culture change to consider their role as Change Agents by:

- 1) identifying change agency activities under a range of change agency roles
- 2) reflect on their own skills, knowledge and attributes and to identify areas for development

We also have added some provocations to stimulate discussion and thinking about the role of public engagement professionals in culture change initiatives.

## Exercise 1 – Are you undertaking change agency activities?

It's rare for a role to be explicitly pitched as one of 'change agency'. Far more likely, there'll be elements of your job, certain activities that you undertake, that are about causing change, whether or not you are conscious of this.

To identify whether there are change agency elements to your work, we've listed a range of change activities on the following pages. The activities are grouped as to how they demonstrate a certain type of change agency role.

We suggest that there are four broad change agency roles:

1. **Catalyst** – working as a strategic catalyst for change
2. **Facilitator (solutions)** – providing, or supporting, researchers to find solutions to PER issues
3. **Facilitator (processes)** – delivering activities that help deliver the strategic vision for PER
4. **Broker** – sharing knowledge and resources within and without your organisation

### ACTION POINT

Review the activities aligned with the four roles over the following pages, noting any that you undertake in your job.

The frequency of the activities that you undertake does not matter, just noting whether or not they are part of your current job.

## **ROLE (1)**

Through your work, do you do any of the following in relation to PER:

- Lead a range of internal stakeholders to meet specific PER objectives;
- Horizon scan, keeping ahead of developments in the PER agenda;
- Contribute to / facilitate key discussions and debates with regards PER that inform organisational strategy;
- Facilitate and influence strategic conversations on the PER agenda with senior managers and practitioners;
- Support relevant aspects of funding proposals – e.g. *Pathways to Impact* statements
- Produce a shared vision for PER across your team / department / organisation that aims to create and support conditions for change;
- Incubate and develop key influencers for PER across your organisation;
- Research and respond to relevant, emergent policy agendas;
- Devise / manage a communications strategy for your work.



### **Catalyst**

You are key to precipitating strategic change in your organisation / department / team in relation to PER. You exert influence, lead and manage a variety of activities that aim to deliver change.

## **ROLE (2)**

Through your work, do you do any of the following in relation to PER:

- Act as a highly-specialised, knowledgeable agent within your organisation / department / team, providing 1-1 (coaching) and 1-many (workshop) support to tackle identified PER issues;
- Draw on your broad range of knowledge for a variety of ends in support of researchers;
- Present solutions based on your analysis of stakeholders' strengths;
- Facilitate ideas generation activities;
- Understand, and signpost researchers to relevant third party resources;
- Advocate for the sourcing and combining of knowledge from within and without the University to create relevant solutions for identified issues.



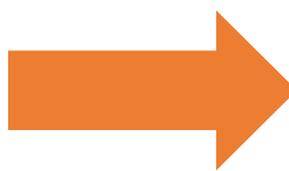
### **Facilitator (solutions)**

You either provide researchers with solutions to PER issues or you support them to identify their own, appropriate solutions to a defined issue.

## **ROLE (3)**

Through your work, do you do any of the following in relation to PER:

- Actively build relationships based on mutual support and mutual learning both within and without the organisation, maximising synergies where possible;
- Create shared understandings and shared language amongst internal and external stakeholders;
- Facilitate PER-related discussions;
- Coach / mentor / train individuals / groups in their understanding of PER;
- Provide a conducive space / environment for inter- and intra-organisational collaboration;
- Deliver events that support reward or recognition for activities undertaken by engaged researchers;
- Identify opportunities for new engaged research activities;
- Contribute to a culture of continuous improvement and continuous learning with regards PER.



### **Facilitator (processes)**

In your day-to-day role, you work in ways that enhance processes for change, helping to implement the strategic vision that acts as a catalyst for change.

## **ROLE (4)**

Through your work, do you do any of the following in relation to PER:

- Link researchers with stakeholders from the same, and different, organisations / sectors;
- Build a database of contacts and resources;
- Act as a broker between your organisation and others;
- Discuss the principles of co-creation and co-production and identify opportunities to engage partners in these principles;
- Explore linkages between 'know-how' and 'know-what';
- Recognise and broker knowledge that can support small-scale local change or than can be transferred and applied on a large-scale across contexts;
- Share knowledge through a range of on- and off-line channels.



### **Broker**

You share knowledge and resources both within and without your organisation in relation to PER.

## **REFLECTION POINT**

You may find that the activities that you undertake are aligned strongly to one or two of the change agency roles. If this is the case, ask yourself:

- Are you happy with the dominance of these type of change agency roles in your work? Are they appropriate to your position and what you're looking to achieve?

Alternatively, you may find that you are undertaking activities that are spread fairly evenly across the four change agency roles. In this instance, ask yourself:

- Are you happy with spreading your change agency work in this way? Or should you be focusing more strategically on particular roles? Or maybe are you confident that these other roles are picked up by / the remit of others in your team?

## Exercise 2 – Change agency skills, knowledge and attributes

You should now have a better idea of the type of change agency roles you're performing through your job (if indeed, you're performing any). The next thing to consider are the skills, knowledge and attributes that are required for each of your change agency roles:

- **Skills** = abilities you acquire through education and other experiences; learned competencies
- **Attributes** = characteristics / attitudes / mindsets that you possess that enable you to undertake a particular role effectively
- **Knowledge** = in this instance, we mean explicit knowledge in relation to the PER agenda

### ACTION POINT

On the following pages, you'll find skills, knowledge and attributes in relation to each of the four change agency roles.

Self-assess against these. Make a note of those that you feel you already demonstrate and those which you need to develop.

Change agent role	Skills (learned competencies)	Knowledge & Attributes (personal qualities)
<b>CATALYST</b>	<ul style="list-style-type: none"> <li>○ Ability to influence senior managers (authority / credibility)</li> <li>○ Inspiring others – mobilising advocates from across multiple audiences</li> <li>○ Networking and outward-looking – having multiple constructive conversations with multiple actors</li> <li>○ Inclusive – bringing the (right) people together</li> <li>○ Advocacy – strongly advocating for change across the organisation</li> <li>○ Horizon scanning – exploring novel and unexpected issues as well as persistent problems or trends</li> <li>○ Agenda setting – influencing change topics and activities</li> <li>○ Facilitation – asking the right questions in the right way</li> <li>○ Constructive feedback and analysis tailored to multiple audiences</li> <li>○ Marketing – building profile both within and without the organisation</li> </ul>	<p>PER-related knowledge:</p> <ul style="list-style-type: none"> <li>➤ Knowledge of the diverse, cross-disciplinary approaches to engaged research</li> <li>➤ Knowledge of HEFCE’s and the Research Councils’ public engagement with research agendas</li> <li>➤ Awareness of the wider UK HE landscape and how it might impact upon the PER agenda</li> </ul> <p>Change agents acting as catalysts should demonstrate high:</p> <ul style="list-style-type: none"> <li>➤ Resilience</li> <li>➤ Optimism</li> <li>➤ Motivation, a strong belief in the cause</li> <li>➤ Diplomacy and political nous</li> <li>➤ Agility, able to respond to opportunities as and when they arise</li> </ul> <p>In addition, the Catalyst role necessitates the ability to be:</p> <ul style="list-style-type: none"> <li>➤ Comfortable crossing departmental and organisational boundaries, understanding the language and values of differing participants</li> <li>➤ Visionary</li> </ul>

Change agent role	Skills (learned competencies)	Knowledge & Attributes (personal qualities)
<p><b>FACILITATOR (SOLUTIONS)</b></p>	<ul style="list-style-type: none"> <li>○ Active listening – ensuring your response is tailored to the other</li> <li>○ Research – sourcing solutions and contacts</li> <li>○ Customer focus – ensuring that the change services the needs of the organisation and its individuals</li> <li>○ Ideas generation – providing options for ways forward</li> <li>○ Expertise – drawing on personal / professional experiences to facilitate solutions</li> </ul>	<p>PER-related knowledge:</p> <ul style="list-style-type: none"> <li>➤ Knowledge of a diversity of non-academic publics</li> <li>➤ Knowledge of diverse research methods</li> <li>➤ Awareness of (organisational) constraints that research and researchers operate under</li> <li>➤ Awareness of the wider UK HE landscape and how it might impact upon the public engagement with research agenda</li> </ul> <p>Change agents looking to facilitate solutions should be:</p> <ul style="list-style-type: none"> <li>➤ Pragmatic, aware of organisational (and other) constraints</li> <li>➤ Credible so that people listen to the solutions with open ears</li> <li>➤ Resourceful with an enabling, ‘can-do’ attitude</li> <li>➤ Decisive to avoid intransigency</li> <li>➤ Creative, able to approach a problem from a multitude of perspectives</li> <li>➤ Adaptable, producing solutions that suit the relevant context</li> <li>➤ Objective where necessary, acting as a critical friend</li> </ul>

Change agent role	Skills (learned competencies)	Knowledge & Attributes (personal qualities)
<p><b>FACILITATOR (PROCESSES)</b></p>	<ul style="list-style-type: none"> <li>○ Coaching / mentoring / counselling – providing 1-1 support where necessary</li> <li>○ Internal and external communication skills – including marketing that supports a culture of change</li> <li>○ Facilitation skills – nurturing discussions, spaces, and activities in the support of change</li> <li>○ Training – devising and delivering relevant professional development opportunities</li> <li>○ Inspiring others – mobilising advocates from across multiple audiences</li> <li>○ Quality control – ensuring the quality of change processes</li> <li>○ Teamwork – supporting a variety of different teams to achieve the change with the ability to move seamlessly between them</li> </ul>	<p>PER-related knowledge:</p> <ul style="list-style-type: none"> <li>➤ Understanding the drivers for external publics to engage</li> <li>➤ Understanding the drivers for researchers to engage</li> <li>➤ Knowledge of local, national, and international opportunities for engagement</li> <li>➤ Knowledge of diverse research methods</li> <li>➤ Awareness of HE functions and processes</li> <li>➤ Expertise in engaged research activities</li> </ul> <p>In order to support change processes, change agents should be able to:</p> <ul style="list-style-type: none"> <li>➤ Harness / influence people’s enthusiasm and capabilities to facilitate change</li> <li>➤ Adapt their ‘field of vision’ to action change (moving from the ‘big picture’ to the ‘little picture’)</li> <li>➤ Act as a critical friend, a skilled helper</li> </ul> <p>In facilitating this role, change agents will demonstrate:</p> <ul style="list-style-type: none"> <li>➤ Insatiable curiosity for how processes might support the change</li> <li>➤ Boundless enthusiasm for the change and the associated activities</li> <li>➤ Inquisitiveness</li> <li>➤ Resilience</li> <li>➤ Reflexivity so that the same mistakes are not made again and again</li> </ul>

Change agent role	Skills (learned competencies)	Knowledge & Attributes (personal qualities)
<b>BROKER</b>	<ul style="list-style-type: none"> <li>○ Networking – making contacts with the (right) people</li> <li>○ Communication skills – specifically, the ability to have multiple conversations with multiple actors</li> <li>○ Information gathering – building contacts and resources to support the change</li> <li>○ Being a node on a network – acting as a connection point to your organisation</li> </ul>	<p>PER-related knowledge:</p> <ul style="list-style-type: none"> <li>➤ Knowledge of how to build effective research collaborations</li> <li>➤ Knowledge of a diversity of non-academic publics</li> <li>➤ Understanding the drivers for non-academic publics to engage</li> <li>➤ Understanding the drivers for researchers to engage</li> </ul> <p>In undertaking a brokering role, change agents will demonstrate:</p> <ul style="list-style-type: none"> <li>➤ Social and emotional intelligence, empathy for the ‘other’</li> <li>➤ The ability to translate work into communities’ specific language</li> <li>➤ Reflexivity so that the same mistakes are not made again and again</li> </ul>

### REFLECTION POINT

In terms of the skills, knowledge and attributes that you feel you already demonstrate:

- Can you remember these being an explicit part of the person specification aspect of your job description? If not, should they be in the future? Is there anything that you can do about this?

In terms of the skills, knowledge and attributes that you think you need to develop, how might you go about securing professional development opportunities both within and without the workplace to help you develop into a more effective change agent?

## Final thoughts and provocations

We are still developing our thinking in this area so would be grateful for any feedback (to [public-engagement@bath.ac.uk](mailto:public-engagement@bath.ac.uk)) on what follows.

We think there are ways of working that are central to any change agency role (irrespective of whether it's one related to PER):

- 1) Credibility
- 2) Collaboration
- 3) Reflexivity
- 4) Social & emotional intelligence
- 5) Belief
- 6) Boundary working

We go into more detail about what we mean for each of these at the end of this document.

**Based on your own experience, what do you think? Do you agree or disagree with our list? Is there anything that we've missed out or that shouldn't be included?**

Finally, we wonder whether it's helpful to consider if / how change agent roles are informed by:

- a) The stage you are at in terms of your overall change project and;
- b) The internal audience that you are working with – broadly, researchers at differing career stages (early career (including postgraduate), mid-career and senior researchers).

To illustrate – in a three year culture change project in an institution that has **little prior experience of public engagement with research**:



	Year (1)	Year (2)	Year (3)
Early career	Facilitator (solutions)	Facilitator (solutions) Facilitator (processes)	Facilitator (processes) Broker
Mid-career	Facilitator (solutions) Broker	Facilitator (solutions) Broker	Facilitator (processes) Catalyst
Senior	Catalyst	Catalyst	Catalyst Facilitator (processes)

The roles in red are those taken on not by the change agent but by the researchers themselves

The above assumes that as culture changes over time there will be a move away from change agents presenting / facilitating solutions as they create conditions and up-skill others to divine the solutions themselves. At this point, the emphasis moves to change agents that facilitate processes and that broker opportunities. Acting as 'catalysts' at the highest level remains a constant throughout as such a role is crucial for creating and maintaining the conditions for change.

In terms of career stages, it is assumed that **early career researchers** are new to public engagement and so most in need of 'solution-giving'. This may also be the case for the majority of professional service staff. As they develop their experience of the agenda, so support turns to that of 'process-helping' and brokerage (the latter especially as early career researchers may have less developed networks of their own).

**Mid-career academics** may require (quick-fix) solutions (particularly if they are the 'squeezed middle') in the early stages of change but also, a refreshing of their internal and external networks through brokerage. Change agency work with them adapts once their support for the agenda has been won. When this has occurred, they may be willing to take on a more proactive role, facilitating processes themselves and even acting as catalysts within their departments.

For **senior academics** (and senior professional services staff), the 'catalyst' role is essential throughout to ensure that those most senior in the institution remain supportive of the engaged research agenda and willing to change infrastructures / procedures in a way conducive of the required culture change. As key influencers within the institution, some senior staff may be willing to take on elements of the 'catalyst' and 'facilitating process' roles themselves as the project progresses.

We recognise that there can be no 'one-size-fits-all' model for culture change and that local conditions will be unique. However, **is the above a helpful approach to think on how to apply change agent roles across the course of a culture change project? Could it usefully feed into the strategic direction and activity planning for a change project? Or is this all a step too far?!**

Remember, we would welcome any feedback at [public-engagement@bath.ac.uk](mailto:public-engagement@bath.ac.uk)

## Credibility

The personal quality of being trusted, convincing and believable. What does this look like in practice?

- Having good judgement demonstrated through an evidence-able track record
- Possessing relevant knowledge and expertise
- Demonstrable active listening skills; an ability to understand others' circumstances
- Being able to provide, or source, answers
- Adept at giving constructive feedback
- Possessing useful connections to link people together
- Knowledge of past activities that can inform present

## Reflexivity

Operating as a reflective and reflexive practitioner, demonstrating the ability to:

- 'Think on your feet', to reshape activity during delivery if required
- Think critically in order to explore relevant aspects of your own and others' professional practices
- Challenge your own beliefs, values, attitudes, and assumptions

Working in this way is crucial to ensure that change agency activities are agile, evolutionary and open to changing circumstances.

## Collaboration

Core to engagement work is the spirit of collaboration, of working with (rather than for) others to achieve mutual benefit. Engagement practitioners will look to build a variety of collaborations through their change agency work – internal collaborations that help foster the infrastructural and process changes required within an organisation and external collaborations crucial to the design and delivery of engaged research activities.

Ways of working  
central to any change  
agency role

## Belief

Change agents should actively demonstrate a strong belief in the change for which they are advocating. It's highly likely that the change will align with their own personal and professional values.

## Social and Emotional Intelligence

Social and emotional intelligence are critical determining factors for leadership success and as such, are vital to change agent roles. Emotional intelligence involves a capacity to recognise and manage your and others' feelings whilst social intelligence is the ability to be socially aware and to manage relationships accordingly. There are four key competencies of emotional and social intelligence:

	What I see	What I do
<b>Personal competence</b>	<b>Self-awareness</b> (understanding yourself)	<b>Self-management</b> (managing your behaviour)
<b>Social competence</b>	<b>Social awareness</b> (understanding other people)	<b>Relationship management</b> (managing intercommunications)

Using emotional and social intelligence in all change agency communications entails: paying attention to the impact of that communication on others and to flex delivery accordingly; and seeking feedback and monitoring responses

Such approaches enhance the efficacy of the communication.

## Boundary working

Engagement practitioners should sit on the boundary of their organisation facing both out to the external environment and in to the internal.

Through such positioning, they're able to:

<b>Network</b> – building inter- and intra-organisational contacts to help facilitate change	<b>Translate</b> – ensuring mediated activities are in the right language for target audiences
<b>Mediate</b> – for example, relevant policy from the external environment into the internal or internal activities / impacts into the external	<b>Broker</b> – building collaborative relationships between external and internal audiences