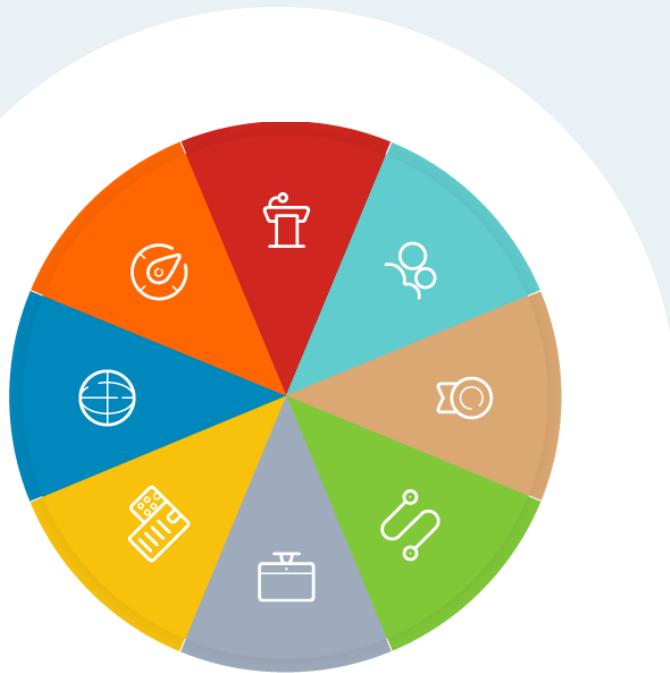




# A Quick Start Guide: Self-Assessment for the Individual & Group Participants, and Organisers

Resource for the User Journey Step 1: Reflect



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## Overview

**This guide provides a resource for Step 1, 'Reflect,' of the four-stage HEInnovate Transformation Journey**, a cycle that also comprises the steps 'Engage,' 'Plan,' and 'Act.' It offers step-by-step instructions for completing the HEInnovate self-assessment, whether as an **individual user, a participant in a group self-assessment, or as an organiser (administrator) of a group**.

The guide explains how to access the platform, complete the assessment, interpret results, and manage group participation. It is intended for a broad range of users, including students, academic and administrative staff, managers, institutional leaders, facilitators, and other higher education stakeholders interested in reflecting on innovation and entrepreneurship practices within their institutions.

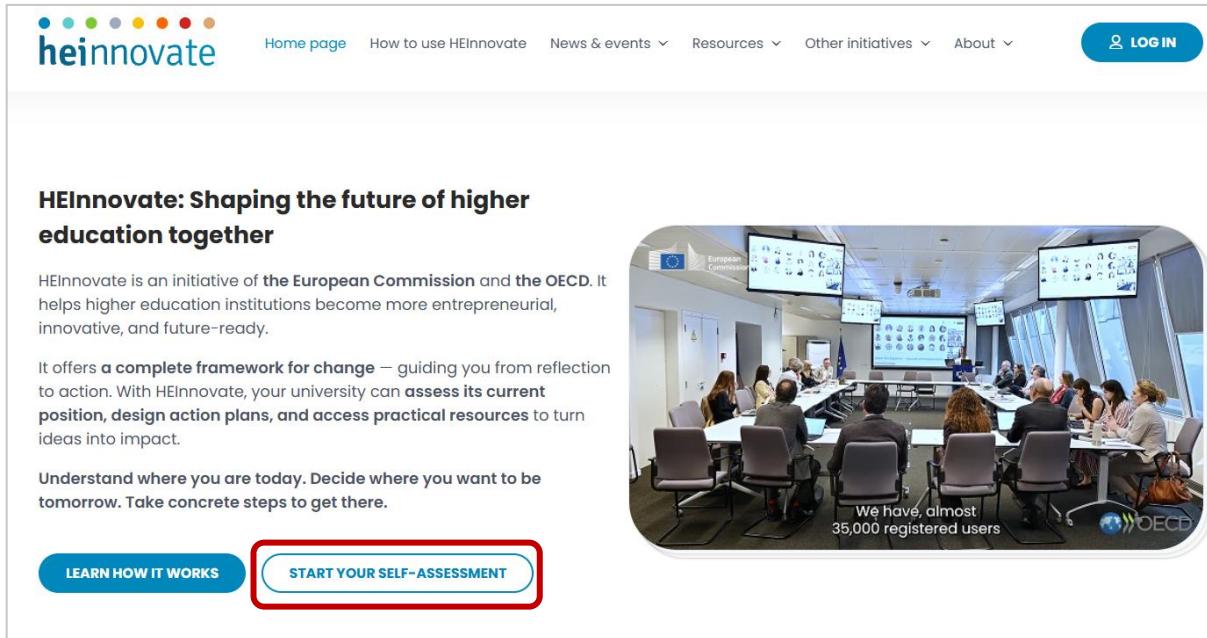
The guide highlights key principles of the HEInnovate approach, including confidentiality, non-benchmarking use of results, and the value of the self-assessment as a basis for reflection, dialogue, and future development. Whether used independently or in a workshop setting, it aims to facilitate a smooth and well-informed assessment process for all users.

## Individual self-assessment

We strongly recommend running the self-assessment as a **registered user**. Registration allows you to save your results, return to your assessment at a later stage, and access the full range of analysis features available on the platform.

### 1. Accessing HEInnovate

- Visit [www.heinnovate.eu](http://www.heinnovate.eu).
- Click on "Start your self-assessment" (see Screenshot 1 below, framed in red)



HEInnovate: Shaping the future of higher education together

HEInnovate is an initiative of the European Commission and the OECD. It helps higher education institutions become more entrepreneurial, innovative, and future-ready.

It offers a **complete framework for change** – guiding you from reflection to action. With HEInnovate, your university can **assess its current position, design action plans, and access practical resources** to turn ideas into impact.

Understand where you are today. Decide where you want to be tomorrow. Take concrete steps to get there.

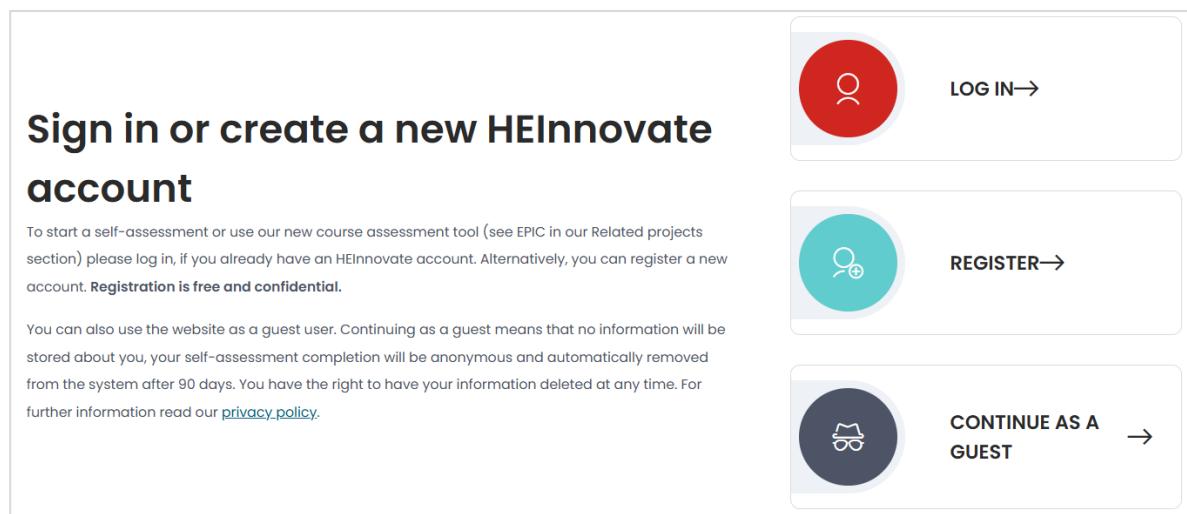
[LEARN HOW IT WORKS](#) [START YOUR SELF-ASSESSMENT](#)

We have, almost 35,000 registered users

#### SCREENSHOT 1 START YOUR SELF-ASSESSMENT

- Choose one of the following options (see Screenshot 2):
  - **Log in** if you already have an account.
  - **Register** for a free account (recommended if you wish to save and revisit your results).
  - Or **Continue as a guest** if you do not need to save your results. Please note that with this option, you will not be able to return to your assessment after submission, and access to analysis features on the website will be limited.

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**SCREENSHOT 2 CHOOSE HOW TO START THE SELF-ASSESSMENT**

## 2. Starting the individual self-assessment

Figure 1 illustrates the steps required for each access option (log in, register, or continue as a guest).

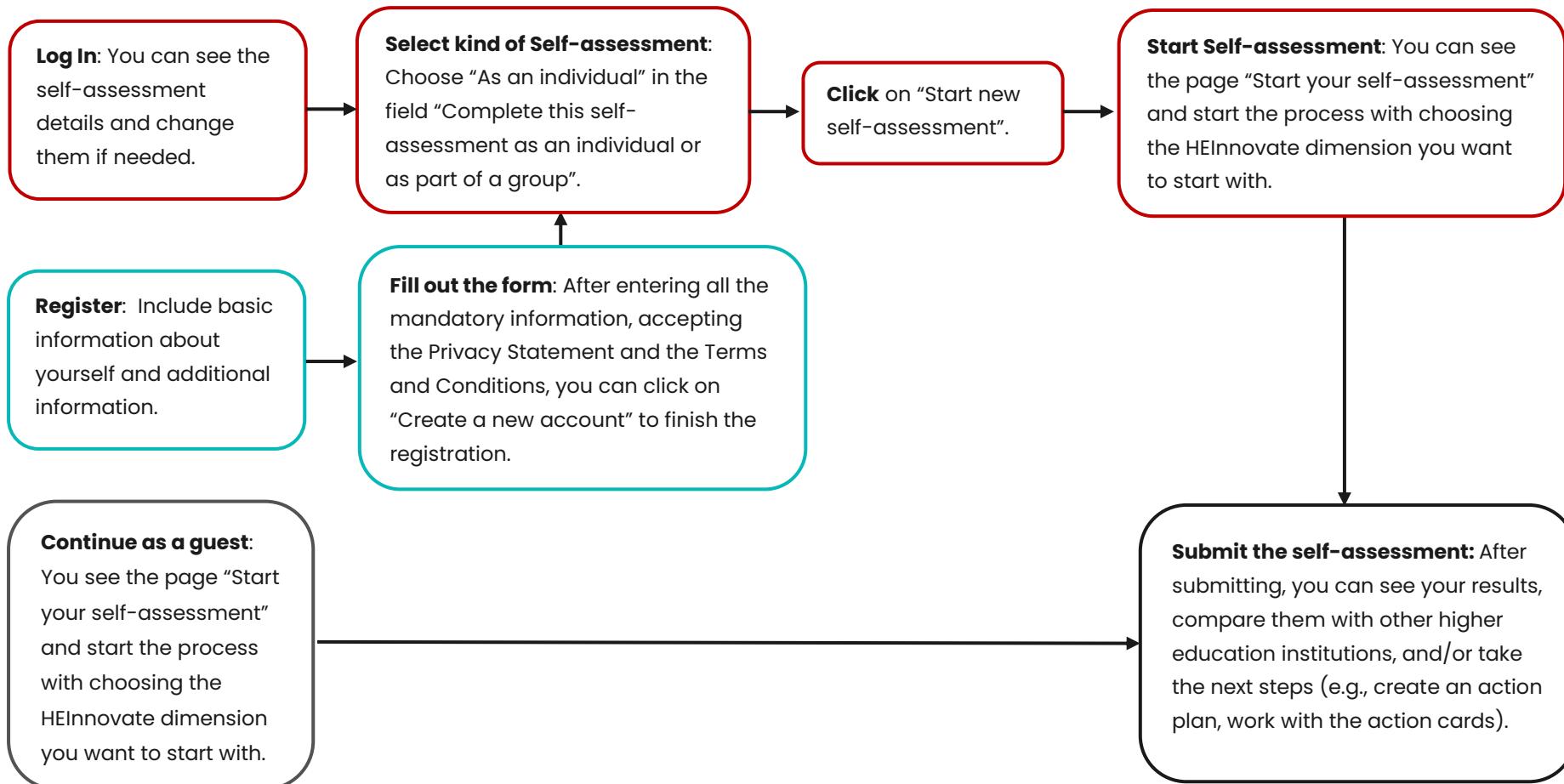
After registration, users are asked to provide basic information such as the name of their higher education institution, country, and role (see Screenshot 3). This information is optional but recommended, as it enables users to view their results alongside aggregated, anonymised results from comparable institutions (e.g. by country, alliance membership, or institutional size).<sup>1</sup>

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<sup>1</sup> Similarity of institutions is based on a similarity index based on the European Higher Education Sector Observatory (EHESO) data set of 3500+ plus European higher education institutions.

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FIGURE 1 THREE OPTIONS TO SUBMIT YOUR SELF-ASSESSMENT



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Remarks on the individual self-assessment for registered users:

- No group link is required.
- Once logged in, you can view and update your self-assessment details.
- You can complete the assessment in one session or return to it later.

**Self-assessment details**

Complete this self-assessment as an individual or as part of a group — **Mandatory field**  
— Select —

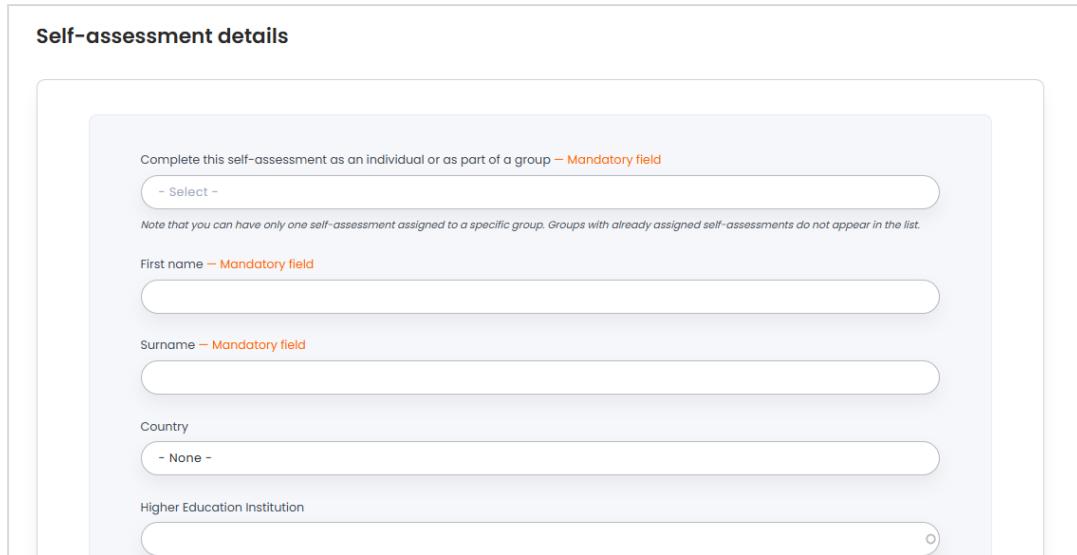
*Note that you can have only one self-assessment assigned to a specific group. Groups with already assigned self-assessments do not appear in the list.*

First name — **Mandatory field**  
[Text input field]

Surname — **Mandatory field**  
[Text input field]

Country  
— None —

Higher Education Institution  
[Text input field]



**SCREENSHOT 3 SELF-ASSESSMENT DETAILS**

After this step, you can complete the self-assessment. Further guidance on this step is provided in the chapter **Completing the self-assessment**.

## Group self-assessment – As a participant: Joining and completing a group assessment.

Group self-assessments support shared reflection by bringing together **perspectives from different stakeholders** within one or more institutions. Combining these perspectives helps create a shared understanding of current perceptions, practices, and priorities, providing a foundation for follow-up discussions and action planning.

Group self-assessments are also particularly useful for **university alliances** or similar networks of universities, as they gather insights from multiple institutions and stakeholder groups. The aggregated results help identify shared strengths and growth opportunities within the group of institutions, providing evidence to guide collaborative strategy-setting and coordinated future initiatives.

### 1. Accessing HEInnovate and the group self-assessment

As a participant, you will be invited to the group self-assessment through a direct email from the HEInnovate system or via an invitation link distributed by the facilitator. Upon joining, the group format enables multiple stakeholders to complete the assessment individually while maintaining their own perspectives. After all entries are submitted, the system aggregates the individual responses into a collective dataset, providing a foundation for analysis, evidence-based reflection, and strategic dialogue among the members.

To start the group self-assessment, follow these steps:

- Click on the individual link provided to you.
- Select either “Log in,” “register,” or “Continue as a guest,” as described in the **Starting the individual self-assessment** section (logging in or registering is strongly recommended).
- Alternatively, you can start a group self-assessment by logging in at [www.heinnovate.eu](http://www.heinnovate.eu) and clicking “start new self-assessment.” In the first field (“Complete this self-assessment as an individual or as part of a group”), choose “As part of a group” and then click the name of the respective group (see Screenshot 4).

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**Self-assessment details**

Complete this self-assessment as an individual or as part of a group — **Mandatory field**

- Select -

**Individual self-assessment**

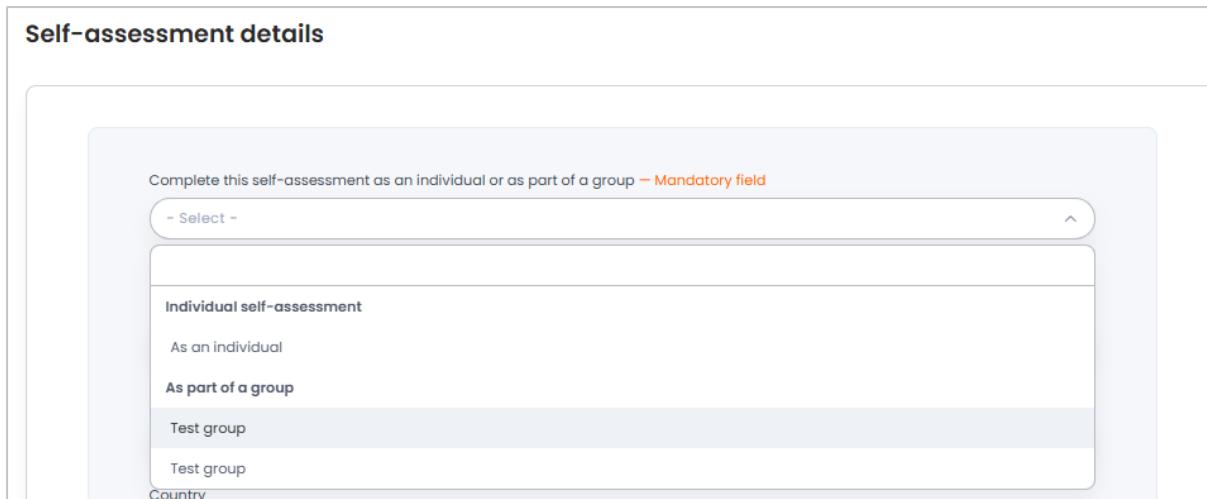
As an individual

As part of a group

Test group

Test group

Country



**SCREENSHOT 4 START SELF-ASSESSMENT AS PART OF A GROUP**

## 2. Completing the group self-assessment

All participants complete the same assessment individually within the group workspace. The assessment process, rating scale, and submission rules are identical to those used in the individual self-assessment. Further guidance on this step is provided in the chapter **Completing the self-assessment**.

## 3. Confidentiality and use of results

Individual responses are kept confidential and are not associated with participants' names. Facilitators can access aggregated group results on the platform or download an Excel file containing individual responses, which does not include participant names. These results are intended to support shared understanding, structured discussion, and institutional dialogue. They are **not intended for benchmarking, evaluation or ranking**.

## Group self-assessment – as an organiser: Creating and implementing a group self-assessment

This section provides **guidance for facilitators** on **setting up and managing a HEInnovate group self-assessment**. It explains how to create a group, invite participants, track progress, and review results to support structured discussion and subsequent activities.

### 1. Log in to start a group self-assessment

Facilitators must have a registered HEInnovate account. Guest access **cannot** be used to create or manage a group assessment.

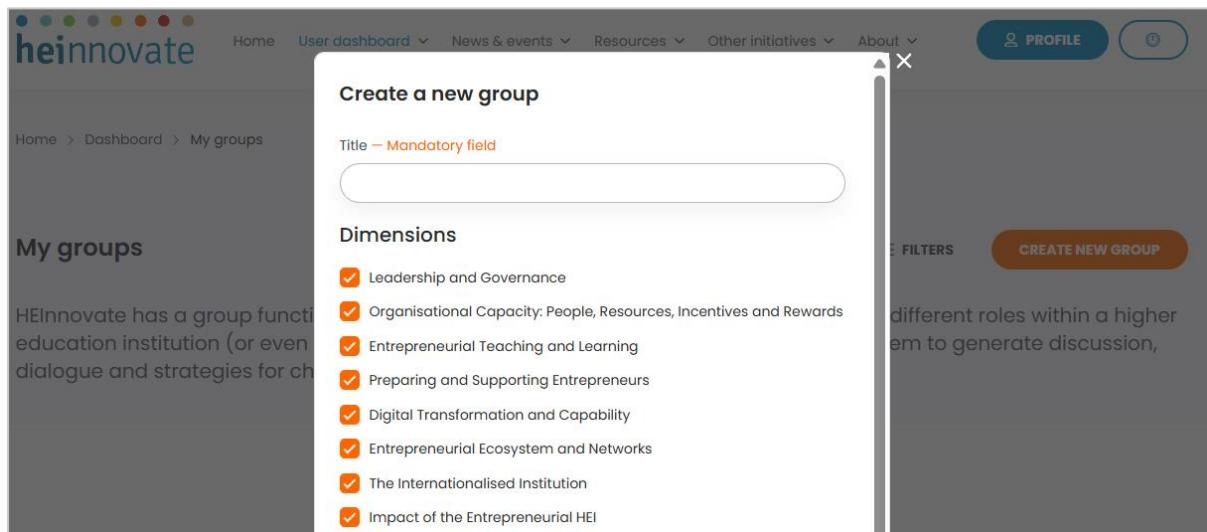
- Go to [www.heinnovate.eu](http://www.heinnovate.eu)
- Click **Log In** and enter your credentials or **register**.

### 2. Create a new group self-assessment

Once you are logged in, you can create a new group self-assessment:

- Go to the **My groups** section on your dashboard.
- Select **“Create new group”**.
- Enter the required details (e.g. **Group title**).
- Select the **dimensions** you want to include in the self-assessment.

By default, all **eight HEInnovate dimensions are preselected**. You can deselect dimensions to focus on specific areas. Participants will only be able to access and complete statements for the dimensions you have selected (see Screenshot 5).



SCREENSHOT 5 CREATE A GROUP FOR A GROUP SELF-ASSESSMENT

### 3. Generate a group link

After creating a group, click “**Invite members**” to add participants to your group (see Screenshot 12). The invitation window allows you to invite participants in two ways: **(1)** by **entering** one or multiple **email addresses** (separated by commas) and sending an invitation message directly through the platform, or **(2)** by copying the **direct group link** shown on the right-hand side and sharing it via email or other communication channels (see Screenshot 6).

The screenshot shows a modal window titled "Invite new members". It has two main sections: "Invite new members" on the left and "...or share direct link" on the right. The "Invite new members" section contains an "E-mail address" input field with a red asterisk indicating it is mandatory. Below it is a message input field with a red asterisk. A blue info icon with a "i" inside provides a tip: "To send the invitation to multiple people at once, enter the e-mail addresses separated by a comma." At the bottom are "CANCEL" and "SEND INVITATION" buttons. The "...or share direct link" section shows a "Direct link" field with a URL: <https://www.heinnovate.eu/en/join-group/bVFlukt4RHY0dmMweldENj5>. A blue info icon with a "i" inside provides a tip: "You can copy the direct link and send it in an email to invite new members to join the group." The bottom of the window has a note: "aggregate form under 'Group results' section."

**SCREENSHOT 6 INVITE NEW MEMBERS TO GROUP SELF-ASSESSMENT**

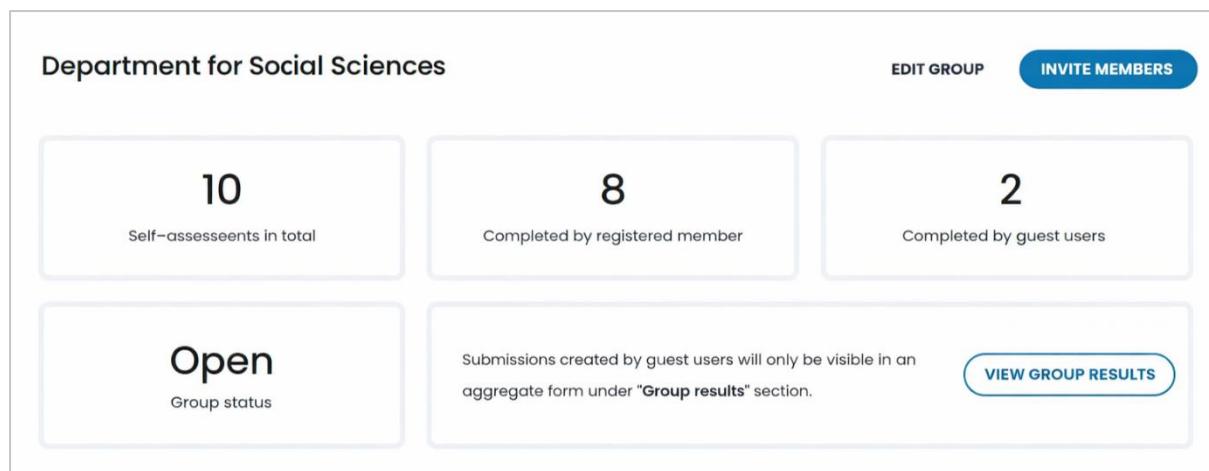
The direct link ensures that participants join the **correct group assessment environment**. When participants click the link, they will be directed to log in or register, confirm their details, and start the group self-assessment.

### 4. Confirming participants have joined

As participants join the group, the facilitator can monitor progress by viewing:

- the **total number of self-assessments submitted**, and
- how many have been **completed** by registered members and by guest users (see Screenshot 7)
- the names of all group members and the status of their self-assessment

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SCREENSHOT 7 OVERVIEW OF PARTICIPANTS IN A GROUP SELF-ASSESSMENT

## 5. Important notes for facilitators

- **Submissions are final:** Participants cannot change their responses once they have submitted the self-assessment.
- **Managing group status:** You may keep the group **open** to allow late submissions or **close** it once data collection is complete.
- **Repeat use over time:** Groups can be reused for follow-up assessments (e.g. after 6–12 months) to track progress and changes in perceptions.
- **Confidentiality:** The group administrator can download an Excel file with anonymised individual responses, which does not include participant names, but includes the role/position and the department/faculty
- **Correct group link:** Ensure all participants use the correct group link to avoid fragmented results across multiple groups.

## Completing the self-assessment

## 1. Do the self-assessment

When starting the self-assessment, you can choose if you wish to complete it for all eight dimensions, or only for those more relevant to your context and objectives. **If you plan to complete all eight dimensions**, it is recommended to start with **Dimension 1: Leadership and Governance** and proceed in sequence. Select a dimension from the drop-down menu and click “start your self-assessment” (see Screenshot 8, framed in red).

## Start your self-assessment

Select one of the dimensions to start or learn more about them below

- Any -

**START YOUR SELF-ASSESSMENT**

Leadership and Governance	Organisational Capacity: People, Resources, Incentives and Rewards
Entrepreneurial Teaching and Learning	Entrepreneurial Ecosystem and Networks
Preparing and Supporting Entrepreneurs	Digital Transformation and Capability
Impact of the Entrepreneurial HEI	The Internationalised Institution

## **SCREENSHOT 8 START YOUR SELF-ASSESSMENT**

The HEInnovate self-assessment usually takes around 20 minutes to complete when you choose to complete it for all eight dimensions. When starting the assessment, you may select your preferred language at the top of the page (see Screenshot 9). The self-assessment is available in all **24 official languages** of the European Union.

## Self-assessment



## SCREENSHOT 9 LANGUAGE SELECTION IN THE SELF-ASSESSMENT

You may also complete the assessment gradually. Participants can move through the assessment step by step using the **“Save and go to the next area”** option, which guides

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them from one dimension to the next. If you prefer to assess only selected areas, you may start with any dimension and submit the assessment at any time by clicking the green “**Submit this self-assessment**” button. The self-assessment will then be submitted with only the dimensions completed up to that point.

Please note that once the self-assessment is submitted, it **cannot be edited**.

**SCREENSHOT 10 OPTIONS TO PROCEED WITH THE SELF-ASSESSMENT**

## 2. How to rate items

Each dimension includes **four to five statements**. Statements are rated using a sliding scale from **1 to 5**, where:

- **1** indicates little or no evidence, and
- **5** indicates a fully developed approach supported by strong evidence

If a statement does not apply to your context or you cannot assess it, you can select “**n/a**” (this option is preselected for each statement). Each statement is accompanied by a short explanation and illustrative examples to support consistent interpretation (see Screenshot 11).

1

Entrepreneurship and innovation are supported by the institutional culture and sustainable funding.

**n/a** 1 2 3 4 5

Becoming an entrepreneurial and innovative HEI is an incremental and long-term organisational development process that requires cultural change, a sustainable and diverse financial basis and access to key resources and investments.

To score highly an HEI could, for example:

- Ensure a close link between the HEI's long-term commitment to investing in entrepreneurial and innovative activities and its financial strategy.
- Continuously engage with funders and investors to secure financial resources to deliver on HEI's objectives.
- Aim for a balanced and diversified range of funding and investment sources, including in-kind contributions.
- Reinvest revenues generated from leveraging their own research, teaching and third mission activities (self-funding).
- Promote initiatives at faculty and HEI levels to bring entrepreneurs together, i.e., academic, professional staff, researchers, students and share practices to inspire community.

**SCREENSHOT 11 EXAMPLE FOR A SELF-ASSESSMENT STATEMENT WITH EXPLANATION AND EXAMPLES**

### 3. Submitting the self-assessment

When completed, click **“Submit this self-assessment”**. Please note that your responses **cannot be edited** after submission. The facilitator will analyse the aggregated results to guide the group discussion and next steps.

At the top of the page, you can **email the results report** to a recipient and/or **download the PDF report**. The PDF includes an overview of the average value for each dimension and displays the selected scores by each individual statement.

## Understanding your results

This section helps you to understand how to interpret HEInnovate results for both individual and group self-assessments and how these results can be used for reflection and next steps.

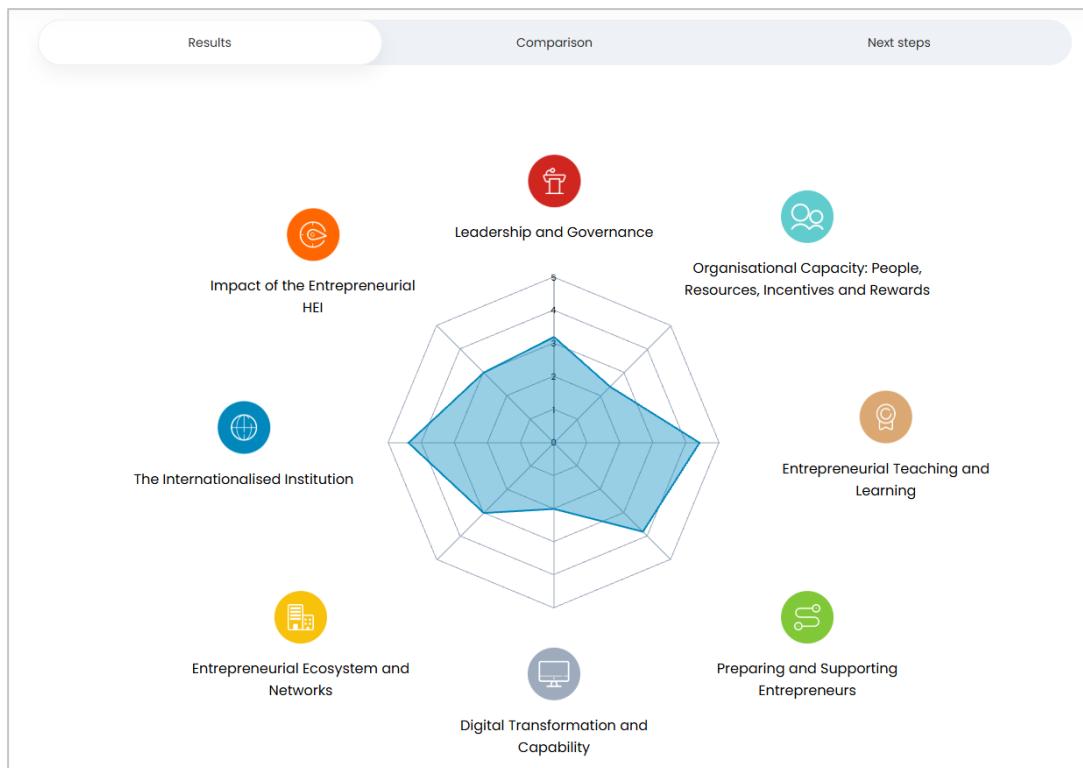
### Your results

After submission, you will see an overview of your results across the eight HEInnovate dimensions (or the dimensions you completed), as shown in Screenshot 12. The spider chart provides a quick visual impression of how your institution performs across different areas. Higher values indicate stronger evidence of established practices in that dimension, while lower values may highlight areas where further discussion or development could be useful.

Your results are designed to **support reflection and dialogue**. All responses are **confidential and visible only to you**. The assessment is subjective by design, meaning it captures personal perceptions and experiences rather than “right or wrong” answers. For this reason, lower scores do not necessarily indicate actual poor institutional performance, but may reflect differences in perspective, limited insight into certain activities, or areas that are still evolving. The results are not used for ranking or benchmarking, but as a practical **starting point for identifying profiles, strengths**, exploring **viewpoints** and considering **priorities for improvement**.

At the top of the page, you will find the option to **email the results report** or **download it as a PDF**: The PDF includes average scores per dimension and the ratings selected for each individual statement.

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### SCREENSHOT 12 OVERVIEW OF THE SELF-ASSESSMENT RESULTS

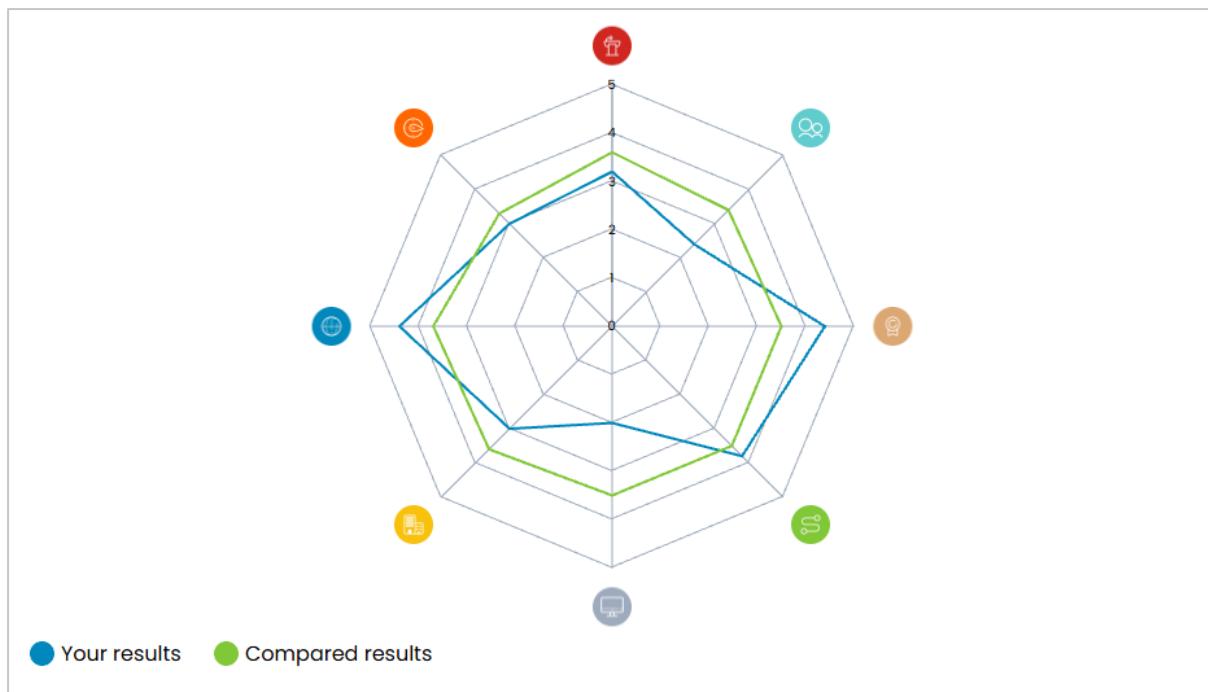
## Comparison

The **Comparison** tab allows you to compare your results with aggregated data from other completed self-assessments. Comparison options include:

- all universities
- by countries
- by alliance membership
- by PhD status
- by size
- by education intensity
- by PhD intensity
- by ISCED fields with most students

In this section, the spider chart allows you to view **your results alongside a second set of results** (see Screenshot 13). Your scores are shown in **blue**, while the comparison scores are shown in **green**. This helps you quickly identify where results are **similar** across dimensions and where they differ, which can support deeper reflection and discussion.

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**SCREENSHOT 13 COMPARISON OF RESULTS WITH ANOTHER GROUP**

## Next steps (individual results)

The **Next Steps** tab provides suggestions on how to continue the HEInnovate User Journey, including options for engaging stakeholders in discussion and moving towards action planning. You will find seven institutional profiles, where the recommended role is highlighted, and tailored Action Cards that provide practical recommendations based on your self-assessment results. You can download or save your action planning canvas and selected Action Cards and access them again later via your personalised User Dashboard. If you prefer, you can also create a fully customised action plan by selecting from the 56 available Action Cards.

## Understanding group self-assessment results

In addition to individual results, HEInnovate also provides aggregated outputs for group self-assessments, which support shared reflection and dialogue.

After all participants have submitted their self-assessments:

- Go to your **User Dashboard** → **My groups**
- Open the relevant group
- Click **"View Group Results"**

You will then see visual summaries (graphs, diagrams, and tables) that present:

- Combined group scores,
- variation in perceptions across participants, and
- strengths and development areas across the eight HEInnovate dimensions.

These results aim to support follow-up activities within the HEInnovate User Journey, particularly **Step 2: Engage** and **Step 3: Plan**. It is important to notice that these results are not intended for ranking, benchmarking, or evaluation purposes.

## Using the group self-assessment results for reflection and next steps

Once results are available, you can review the aggregated outputs to identify key strengths, differences in perceptions and potential priority areas for development. These insights can form the basis for a structured discussion with participants. To support reflection, it can be useful to focus on:

- dimensions with **high agreement** (shared strengths),
- dimensions with **lower scores** (possible development areas), and
- dimensions with **strong variation** (different experiences or levels of awareness).

For practical guidance on how to run this reflection process and move towards action planning:

- Facilitators can refer to the [\*\*HEInnovate basic workshop guide\*\*](#).
- Relevant [\*\*case studies\*\*](#) and [\*\*testimonials\*\*](#) that illustrate how other institutions have used results to inform discussions and follow-up activities.