ACTION PLANNING GUIDE

NHS GREATER GLASGOW & CLYDE

Sharing the iMatter report with your team and agreeing an action plan

Introduction

Well done on encouraging your team to participate in the iMatter process.

This guide is intended to help you with the next stage of the process – discussing the results with your team and agreeing an action plan for the coming year.

Contents

Section 1 - Logging into your account

After your first log in, follow these steps to log in:

To log in, click on the following link: http://nhsscotland-sep.webropol.com; or type this into the address bar of your search engine.
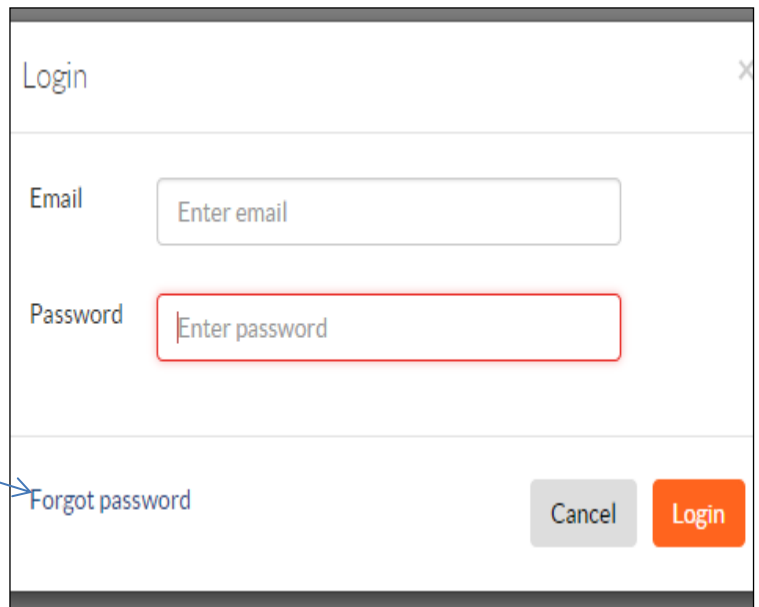
Click on Login

Your login details will be your email address and password created. Note you must type in your full email address i.e. mickey.mouse@ggc.scot.nhs.uk
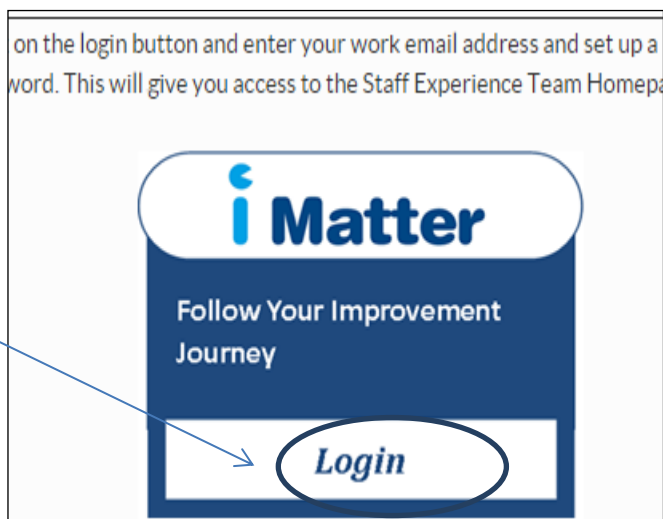
Forgot Password?

If you forget your password do not attempt to enter an incorrect password more than 5 times otherwise you will be locked out of the system
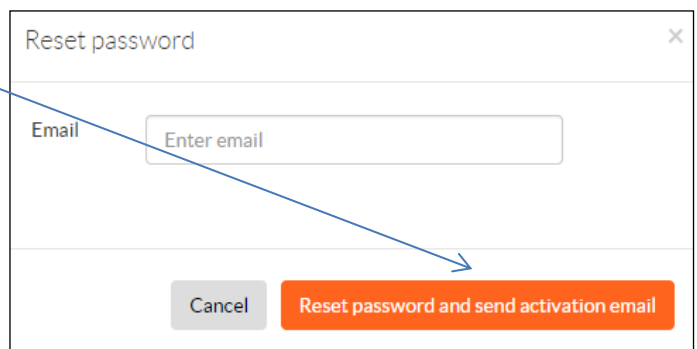
Click on forgot password

Login

Email | Enter email

Password | Enter password

Forgot password | Cancel | Login

In "Reset password" pop up enter your email and click on "Reset password and send activation email"

You will receive an email with a link to reset your password

Click on the link and enter a new password

The link is only valid for 2 days, after which you will need to repeat this process again to reset your password

Reset password

Email | Enter email

Cancel | Reset password and send activation email

If you receive a message saying 'The user doesn't exist' – contact iMatter@ggc.scot.nhs.uk

Section 2 - Viewing reports

2 weeks after the electronic questionnaire is closed, reports will become available (or the next day if your full Directorate/HSCP is responding electronically – check HR Connect for details). Managers will receive an email from Webropol notifying them reports are available. Additionally, staff, with email addresses or mobile numbers entered on the system, will be sent a link to their team report.

Team reports will be published for all teams with a response rate of greater than 0%, however small teams of less than 5 must achieve a 100% response rate to generate a report.

The following reports will be published:

- Team report

- Aggregated Directorate/HSCP report

- A yearly EEI and Response Rates report

- A Yearly Components report

- A sub-directorate report for service/function leads (please contact the iMatter team, if you would benefit from this level of report, and do not have access to this in the iMatter system).

To view reports –

You can access your reports directly from your home page - all the reports that are available will be displayed here as direct links to the report

Alternatively you can see the reports by clicking on select questionnaire, click on your team and click on the view results tab

By clicking on the report links, or selecting the View Results tab, you will be directed to the reporting page.

You will see tabs for all the reports that are available to you.

You can also download all the reports to PDF by clicking on the PDF icon, this will bring the report up on your screen and you can print it off or save it to a file so you can share a copy with your team. However, staff with an email address in the system will be sent a link directly from the system to the team report.

N.B. You will still need to share copies with staff who do not have an email address in the system.
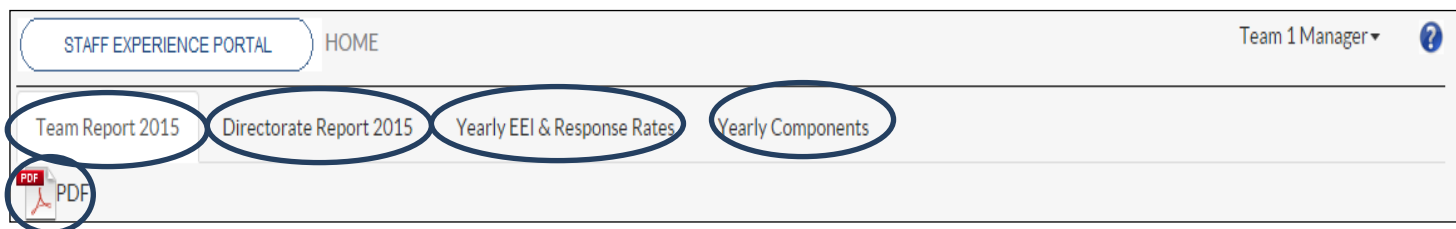
Your Team report will show the following:

- Your Team Response Rate

- Your team Employee Engagement Index (EEI) score - the colour of the EEI score is reflected in the thresholds key below each chart

- The report will also show the NHSScotland Staff Governance Strands which underpin the iMatter Continuous Improvement Model

You will also see 3 sections in your report which are:

- Experience as an individual

- Experience within your Team

- Experience within your organisation

You will see the average score for each question within each of the 3 sections at the end of each line

The thermometer is taken from question 29 and shows the Team average for the overall experience of working within your organisation.

Section 3 - Feeding back to the team / agreeing an action plan

Once you receive your report, engage with your team over the next 8 weeks to discuss the report to and jointly agree your Team Action Plan. Staff with an email address or mobile number in the system will be sent a link directly from the system to the team report.

N.B. You will still need to share copies with staff who completed the questionnaire on paper.

Preparing to feedback

- Read through the report yourself to get your own thoughts on what it is telling you

- Agree a time to meet with the team to discuss. Don't worry if you cannot get everyone together at the same time. You can ask people who cannot attend to let you have any thoughts / ideas they may have to allow you to include them in the discussions

- Print a blank action plan template from your iMatter account under the help icon at the top right of the system ( ). This is useful to allow you to complete and agree actions with the team and then transfer to your iMatter account later.

At the meeting

- Thank the team for taking part, and explain the meeting is to discuss the report and complete an action plan.

- Discuss the report to make sure everyone understands it. Explain it is not about fixing everything at once, it can build on the positives as well.

- The team should jointly agree the action plan. As the manager you can contribute to the action plan however you should agree the actions as a team.

- You can break the team up into small groups to discuss and come up with some actions and then feedback together.

- If, due to the nature of their roles, the team work independently you could focus the discussion around the "individual" / "organisational" sections or the responses to questions based around the manager / team leader.

    "**What we do well" (The section in** <mark>Green</mark>)

    It is important for the team to recognise its strengths. Using the iMatter report, discuss and agree what the team feel should be celebrated and they should continue to do. Some examples may be:

    'We work well together as a team. We support each other to ensure we provide a quality service and quickly resolve any problems'

    'As a team we treat each other with dignity and respect'

    'Everyone is clear about their duties and what is expected of them and able to approach manager if any issues arise'

    'We work together to ensure everyone is valued and involved in decisions relating to the team'

    Desired Outcomes / Actions

- The team should now identify the areas they would like to improve.

- This should be a minimum of one improvement action and no more than three.

- If they cannot find anything to improve, the action might be to continue and maintain the strength identified.

- Some outcomes / actions may be –

Desired Outcome*: The team should be aware of what is happening in the team. Additionally they should have an understanding of what the future plans/programs might be.*
Action*: Staff will be involved / included in the development of the work plan. In addition through team meetings they will have the ability to comment on and influence some of the on-going work*

Desired Outcome*: Communication is clear across the team using the most appropriate method/s.*
Action*: Format of departmental meeting agenda reviewed and a suggestions system established.*

***Desired Outcome****: All staff are clear of what their duties and responsibilities are*
Action*: Job descriptions to be looked at with the team to make sure still relevant / team leaders to discuss changing responsibilities clearly with individuals*

'**Responsible for Action and Target Completion Date**'

- Decide together who will be responsible for taking actions forward.
- Responsibility for an action can be shared by several team members.
- Target completion date should be realistic. Remember the improvement plan spans 8 months.

Recording on your iMatter account

- Now that you have jointly agreed an action plan you can transfer the information to your iMatter account
- You can access the Action Plan page directly from your home page dashboard by clicking on the Action Plan icon
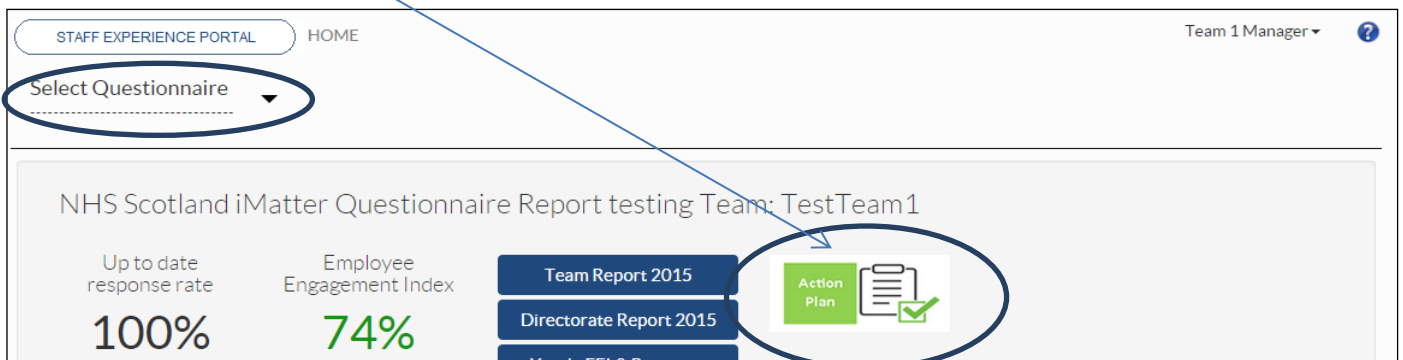
- Alternatively you can access your action plan by selecting the questionnaire, click on your team and clicking on the Action Plan tab.

Add the details from the agreed action plan and regularly click 'save and continue' to edit and make changes.

The character limit is 250 within the action plan.

Once this is agreed and complete, click on the 'Complete Action Plan and Create Storyboard' box.

NOTE once you have done this you can no longer amend the information.

You can save/print your action plan by using the PDF icon

Section 4 – Storyboard

- As soon as you click on Complete Action Plan and Create Storyboard, the Storyboard will be automatically generated.

- You can access the storyboard directly from your home page dashboard by clicking on the Storyboard icon
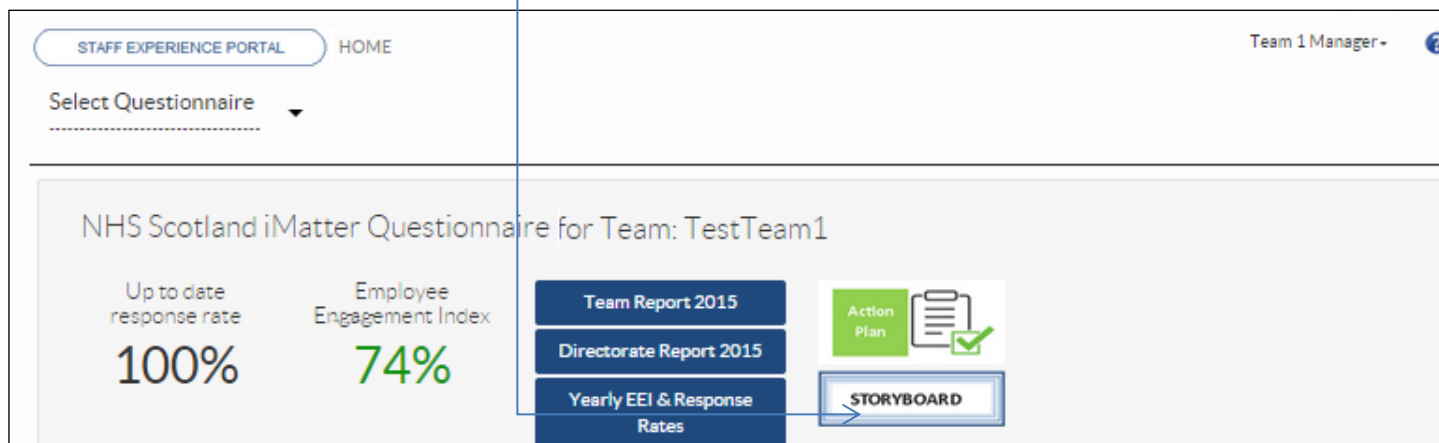
- Alternatively select the questionnaire, click on your team and click on the Storyboard tab
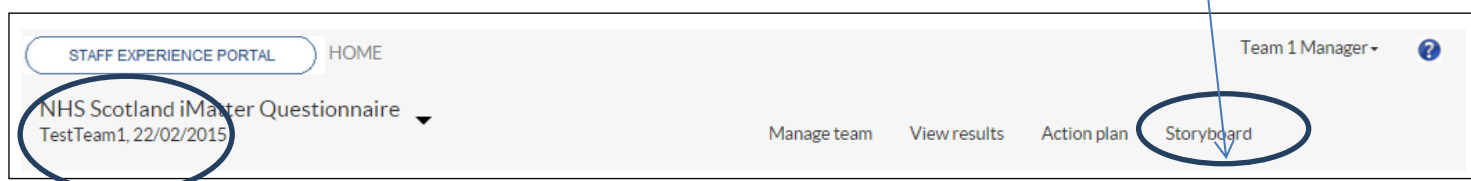
- The storyboard contains the outcomes and desires which were added to the Action Plan.

- It also shows your Team EEI and overall result of working within the organisation from question 29 in the questionnaire results.

- A PDF of the storyboard can be downloaded and printed, as your team may wish to display this in their work area.

- Staff, with an email address entered on the system, will be sent a copy of the Storyboard automatically, however you should ensure those staff with no email access have access to a hard copy.

PDF

i Matter

iMatter Storyboard

Team Nessie

What we do well

> The team have a good working relationship and we support each other to ensure we can get our work done effectively.

Staff Experience Improvement Journey

> **Desired Outcome:** Be more up to date on decisions affecting the team so we all have an understanding of what is required from all team members.
> **Action:** Hold a regular weekly meeting to keep team member updated of any new or outstanding issues. Gerry McGuire to arrange weekly meetings with immediate effect.

> **Desired Outcome:** Communicate more effectively with other teams, especially since this often has a direct impact on our own work.
> **Action:** Identify the 3 core teams we work most closely with so that we can commence a more effective communication strategy.

> **Desired Outcome:** With appropriate training team members will have a better understanding of their roles and should be able to work more efficiently and more effectively.
> **Action:** Contact HR to discuss the need for a Training Needs Analysis for team members, which will identify any skills gaps, to be completed .
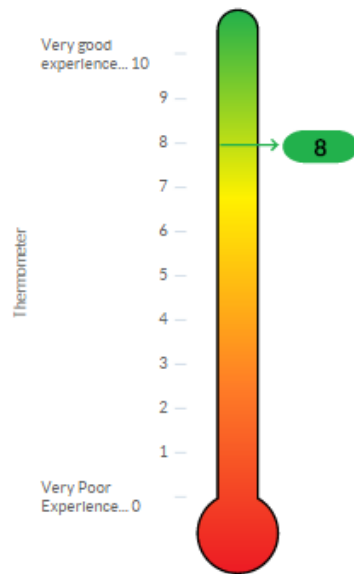
Employee Engagement Index

88%

Employee
Engagement Index

Overall, working within my Organisation is a ....

Responses count: 2

Very good experience... 10

10
9
8 → 8
7
6
5
4
3
2
1

Thermometer

Very Poor Experience... 0

Section 5 - Updating progress

It is important that you and your team stay focused on achieving the agreed actions.

These should be discussed and updated regularly e.g. quarterly or every staff meeting etc.

Progress against each action can be entered onto iMatter Action Plan in the progress update section. This should include the results of the action taken and the date the progress was completed.

You can update this throughout the year and save using the save changes button

Once fully completed, Team managers can 'Complete and Lock' the action plan.

No further changes can be made to the action plan.

Section 6 - What to do if your team did not receive a report

- Teams who did not receive a report should still work together and agree an action plan.

- You should meet with your team to make them aware of the response rate and discuss any barriers they had to participation. **Remember** - the underlying principles of iMatter are about staff engagement and improving staff experience.

- You can then jointly develop and agree an action plan for the coming year.

- Use the overall Directorate report to help focus this discussion. This can be accessed via your iMatter login.

Find out from the team:

- what areas within the questionnaire are important to them

- what they feel they do well as a team

- what areas they feel they could improve on and how they would do this. There should be at least one action and no more than three.

You now upload your action plan onto the iMatter system. See **Recording on your iMatter Account** in Section 3.

The completed action plan should be shared with all the team and kept within the department and progress monitored throughout the year perhaps at team meetings.

Section 7 - Repeating the process next year

As part of your continuous improvement journey the iMatter process will be repeated around the same time each year.

You will be asked to confirm your team details again and will be able to make any changes required before the questionnaire goes out.

You will still be able to access your reports next year to monitor and compare your improvement year on year.

Section 8 - Further information / guidance

Further guides and templates can be found on your iMatter account and can be accessed from the help icon ( ) in the top right of the screen.

More National information on iMatter and staff experience can be found at

http://www.staffgovernance.scot.nhs.uk/monitoring-employee-experience/imatter/

Local iMatter contacts

- iMatter central email contact: **iMatter@ggc.scot.nhs.uk**

- GG&C iMatter Programme Support

  Chloe.Cairns@ggc.scot.nhs.uk   07811 759583

- GG&C Board Operational Lead

  Diana.Hudson@ggc.scot.nhs.uk   07890 596395

Further details can be found at iMatter on HR Connect