

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

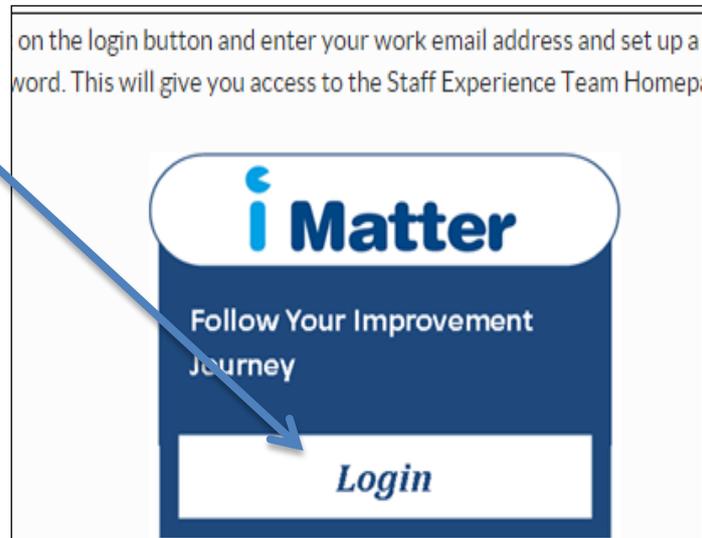
Section 1 – Logging into your account	3
Section 2 – Viewing reports	4
Section 3 – Engaging with your team & agreeing an action plan	6
Section 4 – The Storyboard	9
Section 5 – Updating progress	9
Section 6 – What to do if your team did not receive a report	10
Section 7– Further information / guidance	11

Section 1 - Logging into your account

After your first create your account, follow these steps 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 here to Login

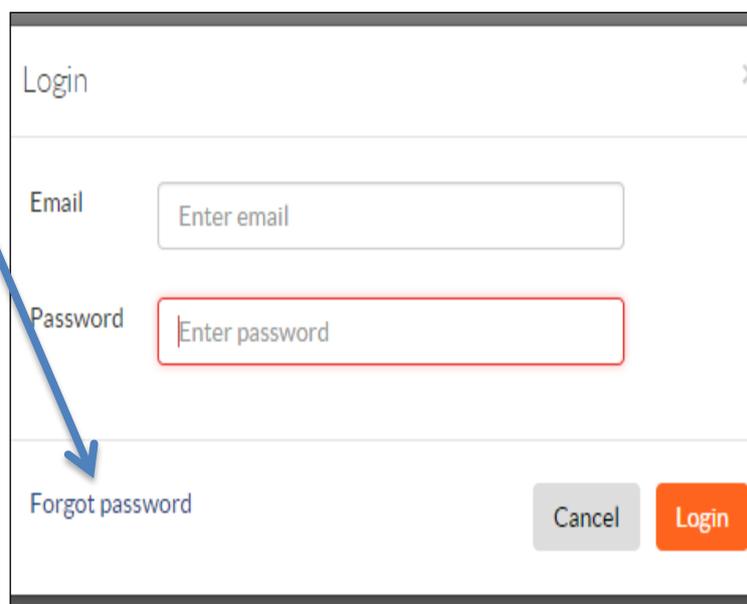


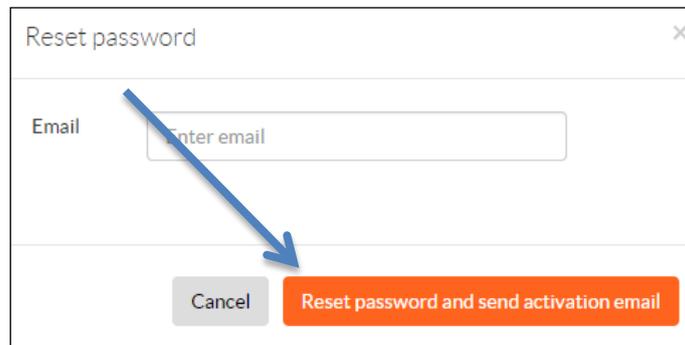
Your login details will be your email address and password created. Note you must type in your full email address i.e. mickey.mouse@ggc.scot.nhs.uk

Forgotten your password?

If you forget your password, please note you will have 5 attempts to enter your password correctly, before you are locked out of the system

Click on forgot password

A screenshot of the iMatter login form. The form is titled "Login" and has a close button (X) in the top right corner. It contains two input fields: "Email" with the placeholder text "Enter email" and "Password" with the placeholder text "Enter password". Below the input fields is a link labeled "Forgot password". At the bottom right of the form are two buttons: "Cancel" and "Login". A blue arrow points from the text "Click on forgot password" to the "Forgot password" link.



Then, within the “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 (note link is only valid for 2 days). Click on the link and enter a new password.

If you try logging in, and receive a message saying ‘The user doesn’t exist’ – please contact iMatter@ggc.scot.nhs.uk and we will assist you in creating your account.

Section 2 - Viewing reports

Two 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 that reports are available. Additionally, staff, with email addresses or mobile numbers entered on the system, will be sent a link to their own 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 need to achieve 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



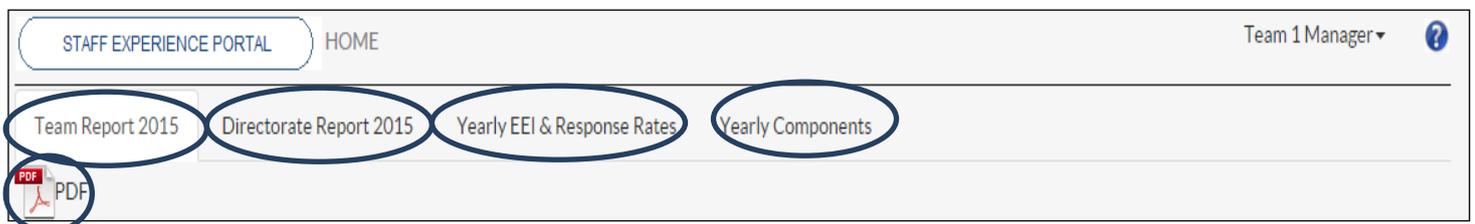
Alternatively you can see the reports by clicking on 'Select Questionnaire', click on your team, and then on the 'View Results' tab.



By clicking on the report links, or selecting the 'View Results tab', you will be directed to the reports 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, which will bring the report up on your screen and you can print it or save it to a file.

(N.B. Whilst staff completing the survey electronically will receive a link to the report, you will still need to share copies with staff who complete via paper copy).



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 Standard Strands which underpin the iMatter Continuous Improvement Model

You will also see 3 sections in your report relating to staff experience:

- As an individual
- Within the Team
- Within the 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 aggregated Team score for the overall experience of staff in the team.

Section 3 - Engaging with your 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.

Preparing to feedback

- Read through the report yourself beforehand to identify what the report tells you about the experience of staff in your team
- Agree a time to meet with the team to discuss. Ideally, use time you already have arranged for a team meeting/discussion. However, if you cannot get everyone together at the same time, you could follow up by encouraging anyone who cannot attend to let you have any thoughts / ideas in advance, to allow you to include those in the discussions
- Download a blank action plan template from the [HR Connect page](#). 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, identify & celebrate strengths and agree an action plan
- Discuss the report to make sure everyone understands it and has seen a copy
- 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

- If you have a large team, you could break up into small groups to discuss and identify strengths and possible actions, and then feedback together

“What we do well” (The section in **Green**)

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.

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 team 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.*

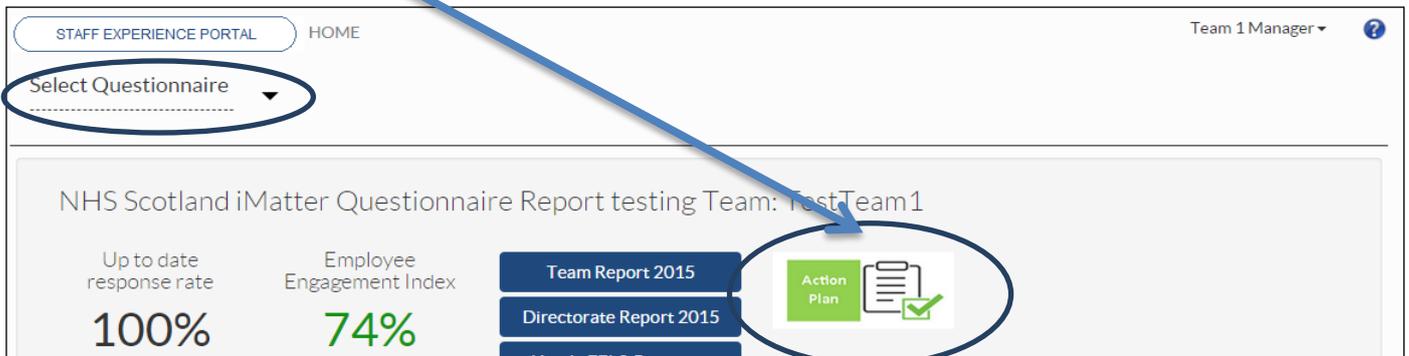
Action: *Format of departmental meeting agenda reviewed and a suggestions system established.*

‘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 a few 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



The screenshot shows the NHS Scotland iMatter dashboard. At the top left, there is a 'STAFF EXPERIENCE PORTAL' button and a 'HOME' link. Below this is a 'Select Questionnaire' dropdown menu. The main content area displays 'NHS Scotland iMatter Questionnaire Report testing Team: TestTeam1'. There are two metrics: 'Up to date response rate' at 100% and 'Employee Engagement Index' at 74%. To the right of these metrics are buttons for 'Team Report 2015', 'Directorate Report 2015', and 'Yearly EFLS Response'. A green 'Action Plan' icon with a checklist and a checkmark is circled in blue. A blue arrow points from the 'Action Plan' icon in this screenshot to the 'Action plan' button in the next screenshot.

- Alternatively you can access your action plan by selecting the questionnaire, click on your team and clicking on the Action Plan tab.



The screenshot shows the NHS Scotland iMatter dashboard. At the top left, there is a 'STAFF EXPERIENCE PORTAL' button and a 'HOME' link. Below this is a 'NHS Scotland iMatter Questionnaire' dropdown menu with 'TestTeam1, 22/02/2015' selected. To the right of the dropdown are buttons for 'Manage team', 'View results', and 'Action plan'. The 'Action plan' button is circled in blue. A blue arrow points from the 'Action plan' button in this screenshot to the 'Complete Action Plan & Create Storyboard' button in the next screenshot.

Add the details from the agreed action plan, and once complete, click on the 'Complete Action Plan and Create Storyboard' box.



The screenshot shows the 'iMatter Action Plan' form. It has two steps: 'Step 1: Read guidance' with an 'Open Action Plan Guidance' button, and 'Step 2: Action plan' with 'Team name: TestTeam1'. Below this is a green box containing the text: 'The team have a good working relationship and we support each other to ensure we can get our work done effectively.' Below this is a table with four columns: 'Area for Improvement', 'Desired Outcome (pulled through to Storyboard)', 'Actions (pulled through to Storyboard)', and 'Responsible for Action Plan and Target Completion Date - who and when'. The table contains three rows of data. At the bottom right of the form, there are two buttons: 'Save and continue' and 'Complete Action Plan & Create Storyboard'. The 'Complete Action Plan & Create Storyboard' button is circled in blue. A blue arrow points from the 'Complete Action Plan & Create Storyboard' button in this screenshot to the 'Complete Action Plan & Create Storyboard' button in the next screenshot.

Area for Improvement	Desired Outcome (pulled through to Storyboard)	Actions (pulled through to Storyboard)	Responsible for Action Plan and Target Completion Date - who and when
Appropriate training to help team members to understand their roles better and what is required from them	With appropriate training team members will have a better understanding of their roles and should be able to work more efficiently and more effectively.	Contact HR to discuss the need for a Training Needs Analysis for team members, which will identify any skills gaps.	Team Manager, End April 2015
Communication within the team	Be more up to date on decisions affecting the team so we all have an understanding of what is required from all team members.	Hold a regular weekly meeting to keep team member updated of any new or outstanding issues. Arrange weekly meetings with immediate effect, starting Monday 23/3/2015	G McGuire, by 23/3/15
Communication between other teams	Communicate more effectively with other teams, especially since this often has a direct impact on our own work.	Identify the 3 core teams we work most closely with so that we can commence a more effective communication strategy. J Graham to compile list and contact 3 main teams by 23 March 2015	J Graham, End March 2015

NOTE: once you have done this you can no longer amend the information, however if you need to make any amendments, please contact iMatter@ggc.scot.nhs.uk to unlock your Action Plan.

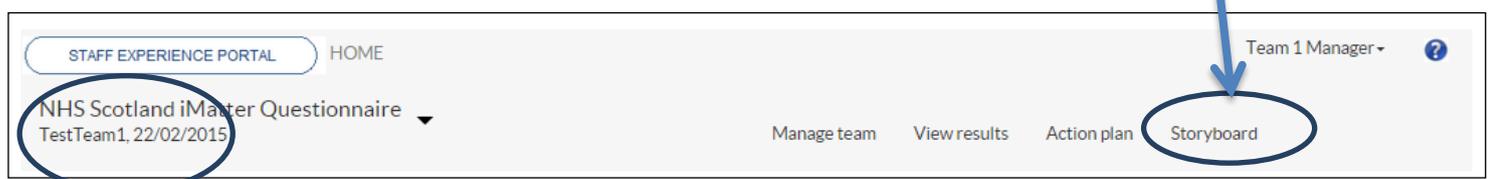
You can save/print your action plan by using the PDF icon

Section 4 – Storyboard

- Once you click '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 summary of the outcomes and actions which were added to the Action Plan.
- It also shows your Team EEI score and the aggregated score from the 'Overall Experience' question.
- A PDF of the storyboard can be downloaded and printed.
- Staff, with an email address or mobile number 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 copy.

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 regularly at team meeting

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.

Step 2: Action plan

Team name: Team FEB 4

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.

Area for Improvement	Desired Outcome (pulled through to Storyboard)	Actions (pulled through to Storyboard)	Responsible for Action Plan and Target Completion Date – who and when
Appropriate training to help team members to understand their roles better and what is required from them	With appropriate training team members will have a better understanding of their roles and should be able to work more efficiently and more effectively.	Contact HR to discuss the need for a Training Needs Analysis for team members, which will identify any skills gaps.	Team Manager. End April 2015
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Communication between other teams	Communicate more effectively with other teams, especially since this often has a direct impact on our own work.	Identify the 3 core teams we work most closely with so that we can commence a more effective communication strategy. Janet Graham to compile list and contact 3 main teams. End March 2015	J Graham, End March 2015

Step 3: Record of Progress

Area for Improvement	Progress Made	Date
Appropriate training to help team members to understand their roles better and what is required from them	TNA conducted and several areas of where training is required has been identified. Training options have been provided by HR.	23rd April 2015
Communication within the team	Weekly team meetings being held.	
Communication between other teams		

Save changes Complete and Lock

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.

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 encourage them to share 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/HSCP 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 progress monitored throughout the year.

Section 7 - Further information / guidance

Further guides and templates can be found on the [HR Connect page](#) of the website.

iMatter contact

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

Further details can be found at [iMatter](#) on HR Connect