iMatter

NHS Greater Glasgow and Clyde

Action Planning Guide

Introduction

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

This guide is designed to support you through the next stage – reviewing the results with your team and agreeing an Action Plan for the year ahead.

Contents

1. Viewing Reports

Reports will be available two weeks after the questionnaire closes (or the next day if your full Directorate/HSCP responds electronically – check HR Connect for details).

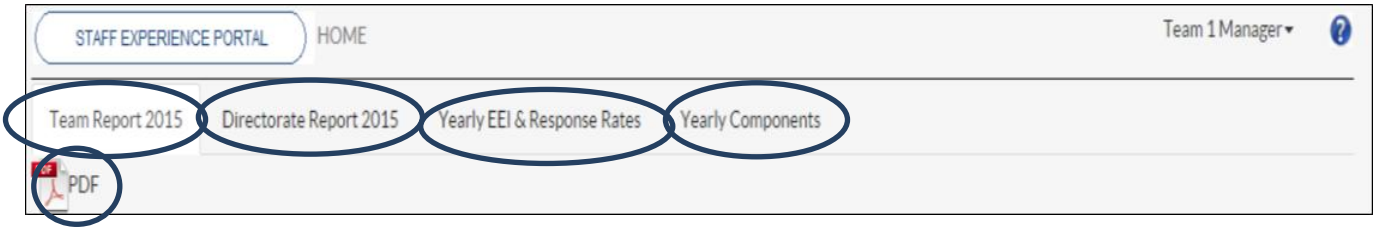
Managers will receive an email from Webropol notifying them that reports are ready.

Staff who have provided an email address or mobile number in the system will receive a link to their team's report, however managers should provide a copy of the report to staff who completed on paper.

Important:
For teams with fewer than 5 members, a 100% response rate is required to generate a team report. For teams with 5 or more members, there is no minimum response rate required.

The following reports will be published:

- Team Report
- Aggregated Directorate/HSCP Report
- Yearly EEI and Response Rates Report
- Yearly Components Report
- Sub-directorate Report for service/function leads
  If you would benefit from this level of reporting and do not currently have access in the iMatter system, please contact ggc.nhsggc.imatter@nhs.scot.

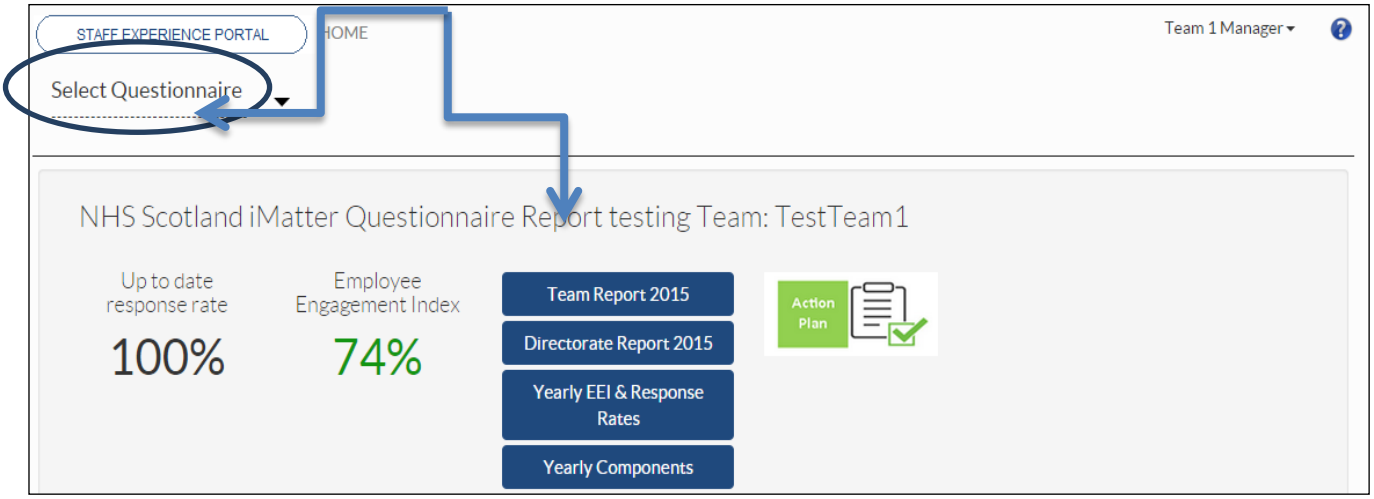


Important:
If your team has not achieved the required minimum response rate, no report will be generated. If your team does not receive a report, you should use either the Directorate Full Report or Components Report (available to access in your account) to discuss and develop your Action Plan.

Tips on how to do this are provided later in this guide.

To view reports:

You can access your team report directly from your Home Page Dashboard. All reports available to you will be displayed here with direct links for easy access:



You can also view reports by selecting 'Select Questionnaire', choosing your team, and then clicking on the 'View Results' tab:

Accessing Reports

By clicking on the report links from your Home Page Dashboard or selecting the 'View Results' tab, you will be directed to the Reports page.

On this page, you will see tabs for all reports available to you.

Downloading Reports

You can download reports as a PDF by clicking the PDF icon. This will open the report on your screen, allowing you to print it or save it to a file.

Sharing Reports

Staff with an email address or mobile number in the system will receive a direct link from Webropol to the team report.

You will need to share copies with staff who completed the questionnaire via paper (i.e. those without an email address or mobile number in the system).

Your Team Report will include:

- Team Response Rate
- Team Employee Engagement Index (EEI) score (the colour of the EEI score corresponds to the thresholds shown in the key below each chart).
- NHSScotland Staff Governance Standard Strands chart (these strands underpin the iMatter Continuous Improvement Model.

Your report will also include three sections relating to staff experience:

- As an individual
- Within the team
- Within the organisation

For each section, you will see the average score for each question displayed at the end of each line.

Additionally, the thermometer graphic is based on Question 29 and shows the team average for overall experience.

Benchmark Overview

The final table in your report provides a benchmark overview for your Directorate/HSCP. It shows how many teams fall into each category within your Directorate/HSCP.

EEI number for teams in the same directorate

EEI Threshold	(67-100)	(51-66)	(34-50)	(0-33)	No report	Total
Number of Teams	74	14	0	0	2	90
Percentage of Teams	82.2%	15.6%	0.0%	0.0%	2%	100%

For a more detailed comparison, you can access your aggregated Directorate/HSCP Report by clicking on the Directorate Report tab in your reporting screen.

2. Feeding Back to the Team / Agreeing the Action Plan

Once you receive your report, engage with your team to discuss the findings and jointly agree your Action Plan. Ideally, this should be completed within 8 weeks of receiving the report.

- Staff with an email address or mobile number in the system will receive a direct link to the team report from the system.

- Please note: As with the team report, you will need to share copies of the action plan with staff who do not have an email address or mobile number in the system.

Preparing to Feedback

- **Review the report in advance**
  Read through the report beforehand to form your own thoughts on what it is telling you.

- **Arrange a discussion with your team**
  Agree a time to meet and ideally use an existing team meeting slot. Don't worry if everyone cannot attend at the same time - invite those who cannot attend to share their thoughts or ideas so they can still contribute.

- **Focus on action planning**
  During the discussion, identify strengths to celebrate and agree up to three improvement actions to progress over the next 12 months.
  You may also link these actions to any other ongoing plans where themes overlap, to support progress and avoid duplication.

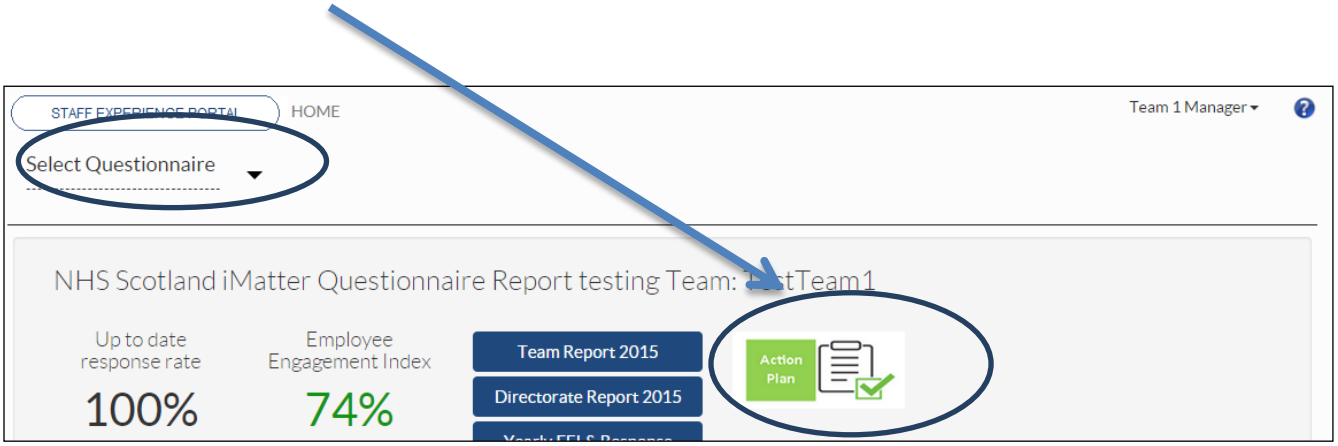
- **Refer to the Team Engagement Guide**
  For more guidance on facilitating discussions, see the Team Engagement Guide on HR Connect.

- **Use the Action Plan template**
  Print a blank Action Plan template from your iMatter account (under the Help icon in the top right corner) or from HR Connect. This helps you record agreed actions during the meeting and transfer them to your iMatter account later.

Recording on your iMatter account

- Once you have jointly agreed an Action Plan, transfer the information to your iMatter account.

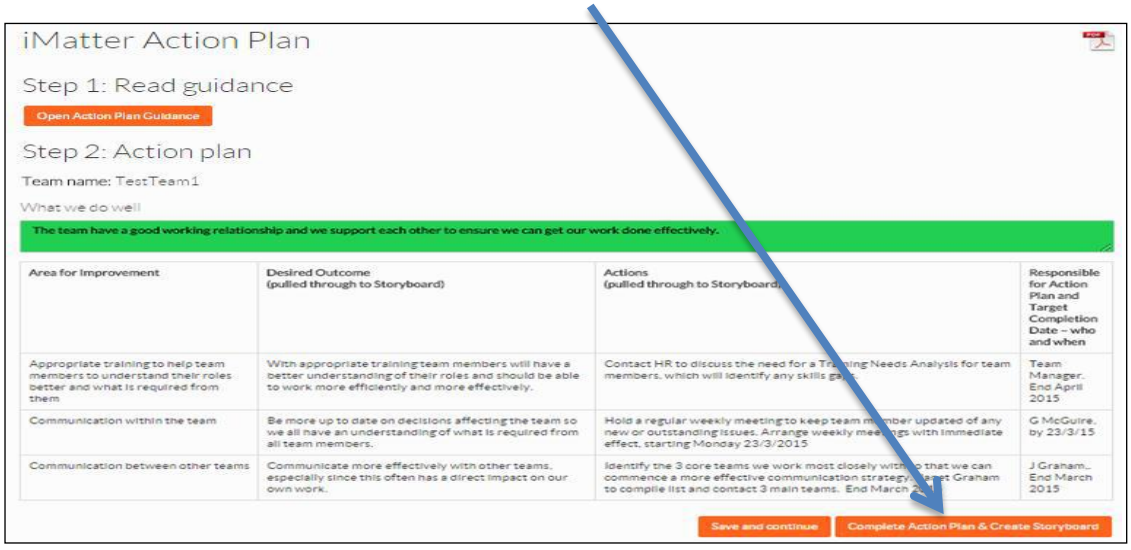
- You can access the Action Plan page directly from your Home Page Dashboard by clicking on the Action Plan icon:



Alternatively you can access your Action Plan by selecting 'Select Questionnaire', choosing your team, and then clicking on the 'Action Plan' tab:

Adding and Finalising Your Action Plan

- Enter the details from your agreed Action Plan and regularly click 'Save and Continue' to edit and make changes.
- Each section/free text box has a 200-character limit (including spaces). You may choose to add a summary of your Action Plan in the system and keep a more detailed version separately (e.g., in Word or Excel). This can serve as a fuller working document for your team.
- Once completed, click 'Complete Action Plan and Create Storyboard'.

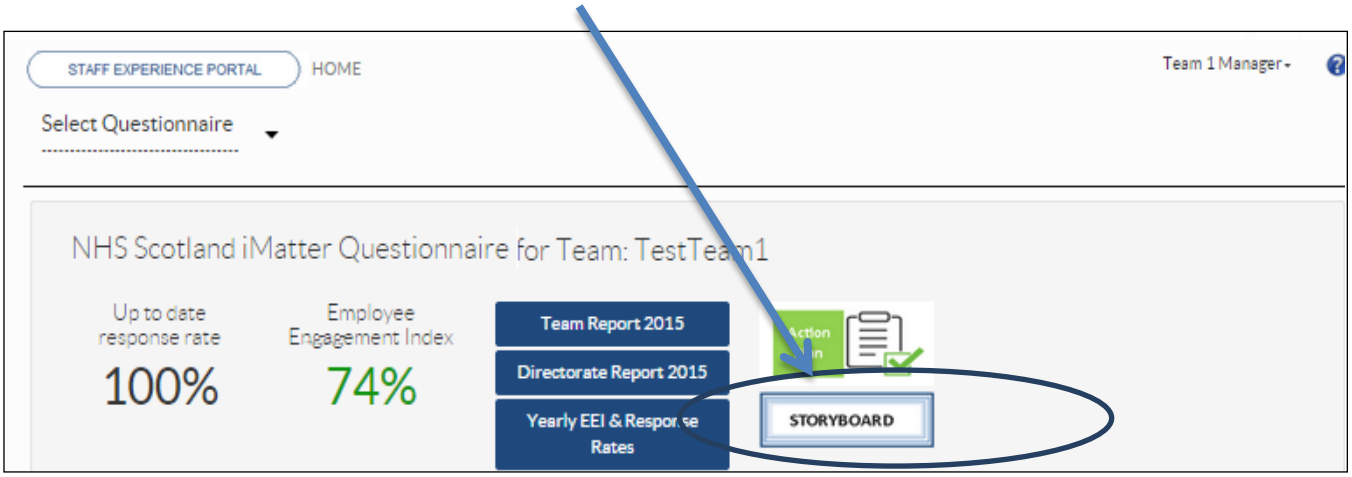


- Important: After this step, you can no longer amend the information. If changes are needed, contact ggc.nhsggc.imatter@nhs.scot to unlock your Action Plan (Local Administrators cannot unlock and reset an Action Plan). You must make the changes and re-save the plan within the 8-week action planning period. Please note: Unlocking Action Plans after the 8-week stage will affect the action planning rate reported nationally.

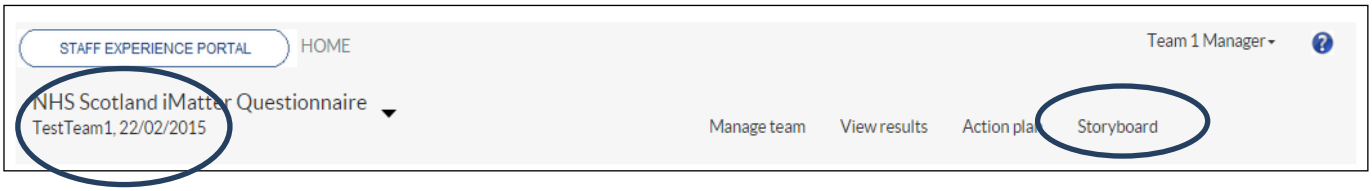
- To save or print your Action Plan, click the PDF icon.

3. 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 'Questionnaire', click on your team, and then click on the 'Storyboard' tab:



Storyboard Details

- The Storyboard contains a summary of the outcomes and actions added to the Action Plan.
- It also displays your Team EEI score and the average score from the 'Overall Experience' question.
- A PDF version of the Storyboard can be downloaded and printed.
- Staff with an email address or mobile number in the system will automatically receive a copy of the Storyboard.

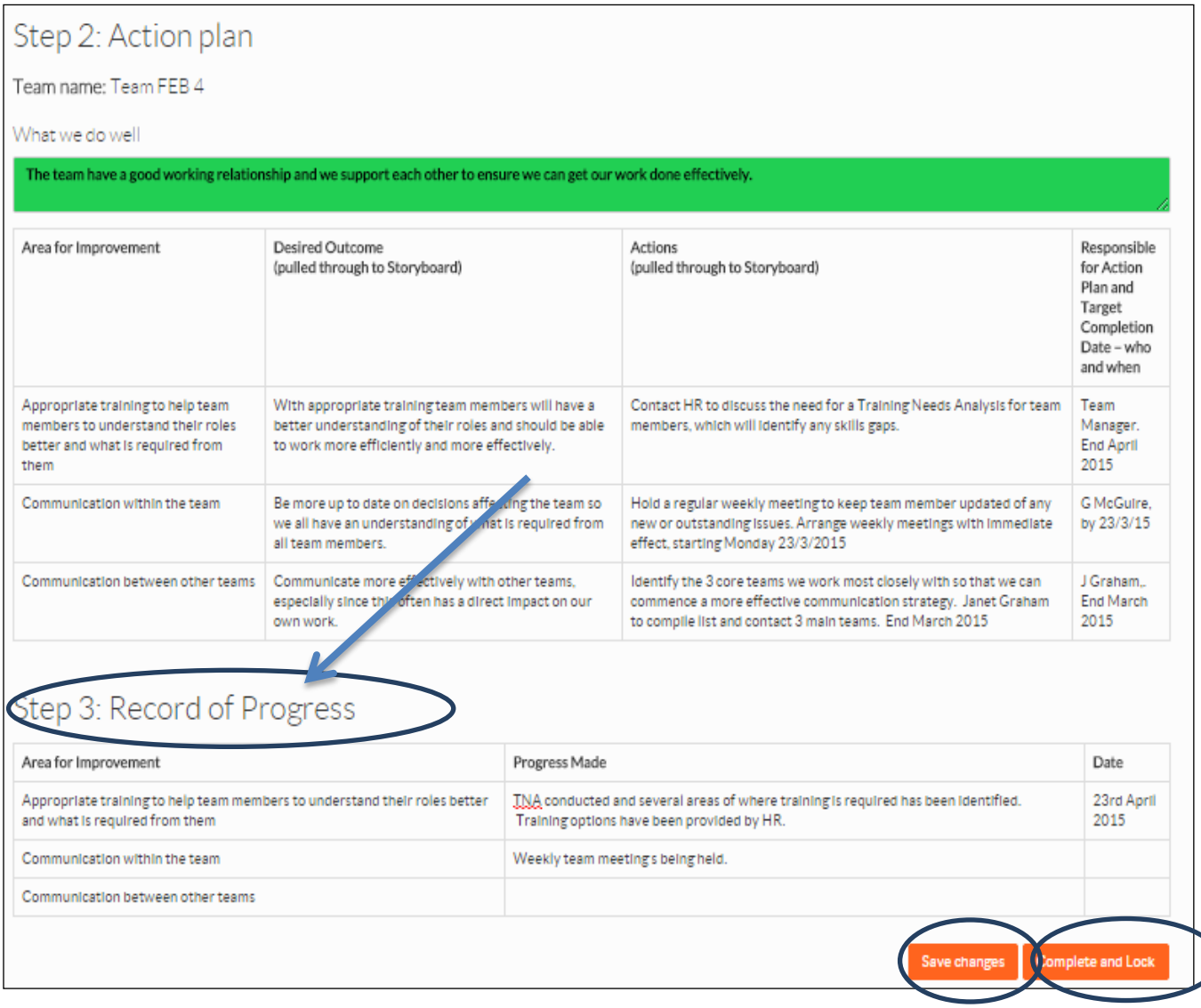
- **Important:** Ensure that staff without email access or a mobile number in the system receive a hard copy

4. Progress Update

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

- These should be reviewed and updated regularly, for example, quarterly or during routine team meetings.
- Progress against each action can be recorded in the Progress Update section of your iMatter Action Plan.
- Updates should include:

- The results of the action taken
- 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
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. 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 progress throughout the year and save changes by clicking the 'Save Changes' button. Once all actions are fully completed, you should click 'Complete and Lock'.

5. Repeating the Process Next Year

As part of your continuous improvement journey, the iMatter process will be repeated the following year.

You will be asked to confirm your team details and can make any necessary changes before the questionnaire is issued the following year.

You will still have access to your reports and Action Plan from the previous year, allowing you to monitor progress and compare improvements year on year.

6. Further Support

Additional guides, templates, and information can on be found on HR Connect.

If you have any questions during the iMatter process:

- Contact your Local Administrator (you can find Local Administrators contact details on Staffnet).
- If no Local Administrator is available, please contact the NHSGGC iMatter mailbox at ggc.nhsggc.imatter@nhs.scot

Date:	10 March 2026
Date for review:	7 January 2027
Replaces previous version:	'2025 Version'