Team Engagement Guide

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1. Introduction

iMatter is designed to help individuals, teams, Directorates, Health and Social Care Partnerships (HSCPs), and Boards understand and improve **staff experience**. This term describes the extent to which employees feel **motivated, supported, and cared for at work**, and is reflected in levels of engagement, motivation, and productivity.

iMatter offers valuable insight into the experiences of our staff. Alongside other programmes such as **Investors in People**, it helps build a clearer picture of what influences a positive experience at work. However, the most meaningful improvements come from **conversations with staff**, which allow us to explore what these reports tell us and foster **positive, person-centred engagement** going forward.

This guide provides **guidance and support for line managers** in leading **engaging action planning discussions** with their team(s) following publication of their iMatter report.

Why engagement matters?
Engagement provides insight into the lived experiences of your team members. When employees feel **valued and heard**, they are more likely to:

- Contribute their best work
- Collaborate effectively
- Remain committed to the organisation

At the end of this guide, you'll find:

- HR Connect/Staffnet resources
- Links to development programmes
- Useful guides

If you're unsure what support you need, please contact the [Staff Experience team](), who will be happy to guide you.

2. Action Planning Discussion and iMatter Report

In this guide, we'll outline the key points of the action planning process and focus on practical ways you, as a line manager, can engage your team in meaningful discussions. The goal is to ensure every team member's voice is heard during action planning and beyond.

This involves:

Using the insights provided in your iMatter report.

- Asking **open questions that go beyond the report**, to explore underlying themes and ideas for improvement.

  By combining data from the report with genuine dialogue, you can create an action plan that reflects your team's priorities and fosters a culture of engagement.

The Action Planning Discussion

Below are some key points to keep in mind during any iMatter action planning discussion. These can also be adapted for ongoing team conversations throughout the year to review progress and understand how experiences evolve.

Practical Tips for Engagement

- Use existing team meeting formats to enable discussion – whether **in person**, **hybrid**, or **fully online**. Choose what works best for your team.
- If you can't gather the full team at once, hold **smaller meetings** and then consolidate themes. Communicate outcomes and proposed actions to the whole team via **email** or **MS Teams** (or whichever method is suitable for your team).

Discussion Prompts

- **What does a good experience at work look like?**
  Encourage team members to share their thoughts (this could be via an

online whiteboard, through discussion or on paper). This helps identify what matters most to the team.

- **What has changed since completing the iMatter questionnaire?**
  Has the experience improved, or are new opportunities for improvement emerging?
- **Go beyond the report**
  Many other factors which could influence staff experience, are not covered by iMatter. Make time to discuss these themes and include actions that reflect what's important to your team.
- **Celebrate strengths**
  Based on your report and discussion, identify what the team should continue doing well.
- **Identify the top areas for improvement**
  Consider what the *main* achievable actions are for improvement in the next 12 months, and agree these as a team.

Handling Individual Concerns

If one person raises concerns that differ from the wider team's experience as they are related to an individual experience, agree to address these in a **1:1 discussion**, outside of the team action planning process.

Assigning Responsibility

- Share responsibility for actions across the team, where appropriate.
- Some actions might be a team-wide action, where the whole team will
- Actions can be team-wide or assigned to individuals as part of their **Personal Development Plan and Review (PDP&R)**.

Prioritising Actions

- Focus on **no more than three improvement opportunities**.
- Link these to other ongoing action plans where possible to avoid duplication.

Important Reminders

- You **cannot change everything** – focus on what the team can influence.

Escalate wider organisational concerns to your line manager or the **Staff Experience team** via this link. These will be considered at the appropriate level (Directorate, HSCP, Service, or Board).

The iMatter Report

Within the iMatter report, the **Employee Engagement Index (EEI)** score provides an indication of the team's overall engagement level based on the themes measured in the questionnaire.

- The **EEI** is calculated from **28 questions** relating to staff engagement.
- It produces a score **out of 100**, which is then grouped and colour-coded for easy interpretation:

Colour Coding:

- **Green** – High engagement
- **Yellow** – Moderate engagement
- **Amber** – Low engagement
- **Red** – Very low engagement

This visual system helps managers quickly identify areas of strength and those which may benefit from additional support.

Report Type	Employee Engagement Index (EEI) score range	Key
'Green' range	67 – 100	Strive and Celebrate
'Yellow' range	51 – 66	Monitor to Further Improve
'Amber' range	34 – 50	Improve to Monitor
'Red' range	0 - 33	Focus to Improve
No Report	No EEI score generated as response rate not achieved (100% for teams of less than 5 staff, or 0%)	

Using Your EEI Score to Guide Discussion

Depending on your team's EEI score, you may want to take different approaches when discussing the report, exploring your team's experience, and identifying improvements to take forward together.

- The next sections of this guide will provide key points to consider based on:
- Your team's EEI score range.

The type of report generated (e.g., full team report, Sub Report).

These tailored approaches will help you:

- Facilitate meaningful conversations.
- Focus on priorities that matter most to your team.
- Agree on realistic and impactful actions.

2.1 Green Report

When Your Team Achieves a Green Report

Achieving a **Green report** is a reason to celebrate and reflect on what makes your team strong. Use this opportunity to:

Celebrate Success

- Recognise what is working well and why.
- Share best practice with others via the **Success Register** and **Staff Experience Success Stories** (see [Success Register](#) and [Staff Experience Success Stories](#)).

Plan for the Year Ahead

- Even if there are few areas for improvement, agree on **at least one action** to take forward.
- Your action plan may focus on **maintaining strengths**, considering:
  - Why these areas are strong?
  - How you will continue to sustain them throughout the year?

Consider Improvements Thoughtfully

- It's tempting to focus on lower-scoring areas, but these may not be the most important to your team.
- Ask: **"What is important to you?"** This question helps identify actions that will have the greatest impact on overall experience.

2.2 Yellow Report

When Your Team Achieves a Yellow Report

A **Yellow report** is still a positive outcome and a reason to celebrate, however also allows opportunity for improvement. Use the team discussion to:

Celebrate Success

- Identify what aspects the team wants to celebrate.
- Reflect on what has worked well over the past year.

Prepare for Discussion

- Review areas that scored lower in the iMatter report before the meeting.
- Raise these during the discussion – consider whether recent changes or activities in the team or service may have impacted experience.

Focus on What Matters

- While it's tempting to concentrate on lower-scoring areas, these may not be the most important to your team.
- Ask: **"What is important to you?"** This question helps prioritise actions that will make the biggest difference to overall experience.

2.3 Amber Report

When Your Team Achieves an Amber Report

An **Amber report** indicates that additional focused support may be needed, as the team may need to break down actions to help focus on what they feel is most important. Use the following approach is suggested:

Start with Positives

- Begin by recognising what is good and what is working well.
- Celebrating strengths helps maintain morale and engagement.

Identify Key Improvements

- Discuss larger or more complex improvements that may be required.
- Ask: **"What is most important to you?"** This helps the team prioritise actions that will make the biggest impact.

Consider Recent Changes

- Reflect on any recent changes or activities that may have influenced staff experience.

Plan for Support

- Determine whether the team needs assistance from:
  - **Senior leadership**
  - **Other teams or services**
- Link actions to wider organisational initiatives where possible.

Action Planning

- With an Amber report, you are likely to have **more than one action** to take forward.
- Break down actions into manageable steps to maintain focus.
- If you need help facilitating the action planning meeting:
    - Contact your **local Senior OD Adviser**.
    - Refer to **Further Support and Guidance** at the end of this guide.

2.4 Red Report

When Your Team Achieves a Red Report

A **Red report** indicates significant challenges in staff experience. In this instance, there are likely multiple factors affecting your team's experience at work. As the manager, consider the following approach:

Reflect Before the Meeting

- Review recent **team discussions** and **feedback from 1:1s** to identify any recurring themes which might have influenced team experience.
- Consider whether concerns are:
    - **Large and complex**
    - **Smaller but numerous**
    - **Outside the scope of iMatter** (these should still be acknowledged)

Facilitate a Safe Discussion

- If you feel comfortable, bring the team together to:
    - Discuss the report.
    - Explore what is impacting their experience.
- Ensure the environment is a **safe space** where staff feel able to share openly.
- Give everyone the opportunity to speak, if they wish.

Seek Support if Needed

- If you do not feel confident leading the discussion:
    - Contact your **local Senior OD Adviser** for assistance.
    - Explore **development options** available for managing difficult conversations (see **Further Support and Guidance** at the end of this guide).

2.5 | No report |

When the Response Rate Isn't Met

If your team does not achieve the required response rate (e.g. 100% for teams with fewer than five staff), a report and EEI score will not be generated. However, it's still important to hold a conversation with your team to:

- **Celebrate positive themes**.
- **Identify opportunities for improvement**.

How to Start the Conversation

You will have access to the overall Directorate or HSCP report, which can help guide your discussion. Consider:

- Do these results reflect your team's experience?
- Are there other themes that feel more relevant to your team?

If You Need Support

If you feel unable to take the meeting forward, similar to handling Red reports:

- **Contact your local Senior OD Adviser** for assistance.
- Explore the **development options** available to help with holding difficult conversations (see the "Further Support and Guidance" section of this guide).

3. Ongoing engagement and discussion

To maintain strong team engagement, it's essential to connect regularly and understand your team's experiences throughout the year – not just when completing the action plan. Consider the following:

Schedule Regular Check-ins

- Hold team meetings at set intervals to monitor well-being, workload, and overall experience.

Review Progress on Agreed Actions

- Are the actions successful?
- Have they made a noticeable difference?
- Does the team need support to move any actions forward?
- Is there anything from the previous action plan that could be built upon for the next one?

Encourage Open Dialogue

- Ask open-ended questions to promote sharing:
    - *What's working well for you right now?*
    - *What challenges are you experiencing just now?*

Listen Actively

- Take a person-centred approach by acknowledging feedback and considering next steps.

Keep the Team Informed

- Provide regular updates on actions taken based on their feedback. Even small improvements show that their input drives change.

Model Openness

- Share your own challenges, learnings, and updates to build trust.

Promote Psychological Safety

- Reassure the team that their thoughts, ideas, and concerns are valued.

Engagement thrives where communication is open, actions align with values, and individuals feel seen and heard. By prioritising regular discussion, acting on feedback, and taking a person-centred approach, you create an environment where everyone feels able to contribute and grow throughout the year.

4. Further Support and Guidance

Helpful Guides

[iMatter guides](#)

[People Management Guide - NHSGGC](#)

HR Connect / Staffnet Pages

[Staff Engagement](#)

[Management Development](#)

[Learning, Development and Training team](#)

[Organisational Development team](#)

[Civility Saves Lives](#)

[Staff Experience Team](#)

[Collaborative Conversations](#)

[Investors in People](#)

Useful training and development opportunities

[Essential Skills for Managers (an Introduction) - NHSGGC](#)

[People Management Programme](#)

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