ACTION PLANNING GUIDE

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

1. Logging into your account

Click on http://nhsscotland-sep.webropol.com or type this into the address bar of your search engine.
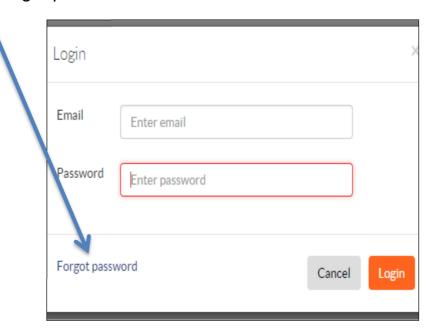
Click here

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

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 that the link is only valid for two 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 your iMatter Administrator and they will assist you in creating your account.

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's report.

In order to generate a full team report for a team of less than 5, all staff must complete (a 100% response rate is required for teams of this size). For teams of 5 or more, there is no pre-required response rate to generate a full team report.
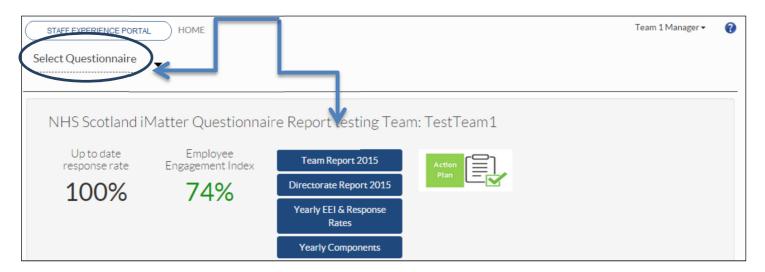
The following Reports will be published:

- 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)

If your team has not achieved the required minimum response rate, no report will be generated. If your team has not received a report, you should use either the Directorate Report, or the Components Report which are available on your account to discuss and develop your Action Plan. Tips on how to do this are covered later on in this Guide.

To view Reports –

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

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 from your home page dashboard, 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 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 or number in the system will also be sent a link directly from Webropol to the team report.

You will need to share copies with staff who completed via paper copy (i.e. do not have an email or number 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 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 three sections at the end of each line.

The thermometer is taken from question 29 and shows the team average for overall experience.

The final table on the report below shows the benchmark overview of your Directorate/HSCP. It shows how many teams fall into each category in your Directorate/HSCP. You can also access your aggregated Directorate/HSCP Report for a more detailed comparison by clicking on the Directorate report tab in your reporting screen.

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%

3. Feeding back to the team / agreeing an Action Plan

Once you receive your report, engage with your team to discuss the report and jointly agree your team's Action Plan. Ideally this would be done within 8 weeks of receiving the report.

Staff with an email address / mobile number in the system will be sent a link to the team's report directly from the system to the team report.

Please note, you will still need to share copies with staff who do not have an email address / mobile number in the system.

Preparing to feedback

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

- Agree a time to meet with the team to discuss. Ideally, use time you already have arranged for a team meeting/discussion. Don't worry if you cannot get everyone together at the same time. You can ask staff 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 in the top right of the screen, or from HR Connect. 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

- Welcome the team and thank them for taking part.

- Explain the meeting is to discuss their staff experience, using the report to frame the discussion, and agree 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 positive 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.

- With a large team, you could break the team up into small groups to discuss and come up with some actions and then feedback together.

"**What we do well**"

It is important for the team to recognise its strengths. 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'

(Please note, the team strength should be entered onto the <mark>green</mark> section of the Action Plan)

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 dates should be realistic. Remember the Action Plan may span 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

- 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 per section/free text box is 200 characters including spaces. However you might add a summary of your Action Plan into the system and the team can create a more detailed version out with the system (i.e. in Word, Excel etc.), this could then also be used as a fuller working document for the team.

Once completed, click on the 'Complete Action Plan and Create Storyboard' box.

Once you have done this you can no longer amend the information, however if you need to make any amendments, please contact a system Administrator to unlock your Action Plan.

You can save/print your Action Plan by using the PDF icon.

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

4. Storyboard

As soon as you click 'Complete Action Plan and Create Storyboard', the Storyboard will be automatically generated.
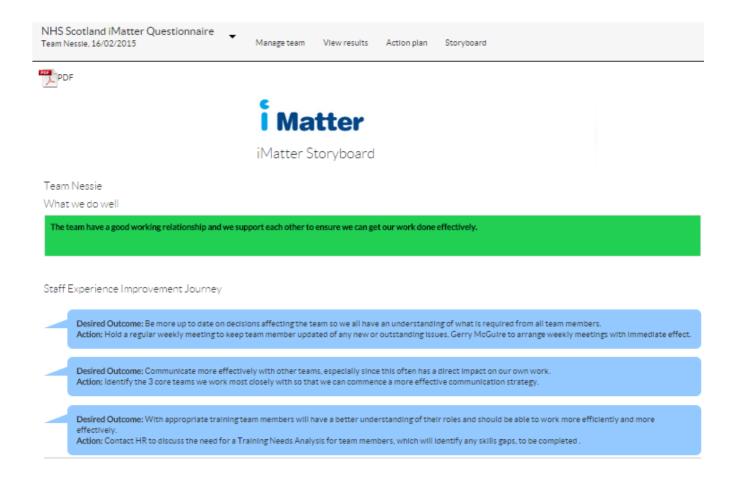
You can access the storyboard directly from your home page dashboard by clicking on the Storyboard icon.

Alternatively select the questionnaire, click on your team and click on the Storyboard tab

- The storyboard contains a summary of the outcomes and actions which were added to the Action Plan.

- It also shows your Team EEI score and the average 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 or phone number in the system have access to a hard copy.

NHS Scotland iMatter Questionnaire
Team Nessie, 16/02/2015   ▾   Manage team   View results   Action plan   Storyboard

📄 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 .

88%

Employee
Engagement Index

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

Responses count: 2

5. Progress Update

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 meetings.

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
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 this throughout the year and save using the save changes button. Once fully completed, Team managers should click 'Complete and Lock'.

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, so you can discuss these themes, even without a report.

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

- which 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 notes above - **Recording on your iMatter Account.**

  The completed Action Plan should be shared with all the team and progress monitored throughout the year.

7. 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 again and will be able to make any changes required before the questionnaire goes out.

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

8. Further Help and Assistance

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

Should you have any questions at any point of the iMatter run, please contact your Local Administrator if there is one assigned in your area; otherwise please contact the NHSGGC iMatter mailbox at iMatter@ggc.scot.nhs.uk.