

Matter

Manager Orientation Workshop xxxx 201x

Delegate Handbook



Contents

Programme	Page 3
Support Pack Information	Page 4
Staff Experience Table of Components	Page 5-6
Presentation handout	Page 8-17
Table of Comparison Rates & Scores	Page 18
Example Feedback Meetings Agenda	. Page 19-20
Webropol Help Tool	. Page 21
Action Plan Guidance	Page 22-23
Example Action Plan	Page 24



Matter Managers' Orientation Workshop

Programme xxxx 201x

Session Aim: To enable team managers to effectively implement iMatter.

Session Objectives:

Know how to effectively use the iMatter continuous improvement model with your team:

- Understanding the annual iMatter questionnaire.
- Getting your iMatter Reports and how to interpret these.
- Providing feedback to your team and developing your iMatter Team Action Plan and Storyboard.
- Monitor and review your team progress.

Agenda: (timings depend on date and refreshment break is flexible)

Welcome, Introductions and Overview

Why? Staff Experience Context (Option – pre-course reading)

What? iMatter Continuous Improvement Model

How and When? Step by Step Guide to implementing iMatter Model

Summary: Role of the Team Manager in implementing iMatter Model

National and Local Board Support

Q&A

Evaluation and Session Close



Managers' Orientation Matter Workshop:

Support Pack for Team Managers

1.	iMatter 20 Staff Experience Components linked to iMatter questions	Hard copy NHSScotland Staff Experience Continuous Improvement Framework/Staff Experience Components Mapped to iMatter Questions [PPT - 640kB]
2.	NHS Scotland Staff Governance Standard	http://www.staffgovernance.scot.nhs.uk/what-is- staff-governance/staff-governance-standard
3.	Academic research to validate the iMatter Model (Final Report of NHS Scotland Staff Experience Project)	Electronic link to this Report http://www.staffgovernance.scot.nhs.uk/monitoring-employee-experience/imatter/research-links/
4.	Further reading on the importance of Staff Experience in relation to NHS/ organisations performance and wellbeing.	Electronic links: Prof Michael West at the Kings Fund and formerly of Lancaster University Business School on engagement, teamwork and culture - employee-engagement-nhs-performance-west- dawson-leadership-review2012-paper.pdf Prof Derek Mowbray of Northumbria University, engagement and wellbeing at work - http://www.mas.org.uk/positive-work- culture/wellbeing.html http://www.staffgovernance.scot.nhs.uk/monitoring- employee-experience/imatter/support-materials/ 'Diverse Voices and Employee Engagement' by Ramya Yarlagadda, Joe Dromey, Simon Fanshawe http://www.ipa- involve.com/resources/publications/diverse-voices/ A report by Lansons and Opinium, July 2015 'Britain at Work' http://www.lansons.com/download-britain-at- work/
5.	Sample iMatter Team Report x 4	Hard copies included
6.	iMatter Frequently Asked Questions.	http://www.staffgovernance.scot.nhs.uk/monitoring- employee-experience/imatter/frequently-asked- questions/
7.	iMatter Promotional Materials	http://www.staffgovernance.scot.nhs.uk/monitoring- employee-experience/imatter/communications- materials/
8.	Board iMatter Implementation Plan	Link to this electronically (insert local implementation plan)
9.	iMatter Portal - online tutorials available for managers for navigating the IT system.	Using the ? help icon on the webropol portal



iMatter Reporting Governance

Healthy Organisational Culture

NHSScotland

- *NHSScotland Report (aggregated from 22 Board EEI scores) and copy of each Board Report with Board EEI Scores
 - Components Report highlighting areas of strength and potential improvement relating to the iMatter questions

BOARD (Chair) - Reporting through Staff Governance and Area Partnership Forum

- Team report (non execs)
- Board (organisational) report comprising aggregated EEI from across the organisation
- Components Report highlighting areas of strength and potential improvement relating to the iMatter questions

CEO:

Team report (Directors)

- *CEO Report comprising aggregated EEI score for all Directorates (except for the Chair's team)
- Board (organisational) report comprising aggregated EEI from across the organisation
- · Components Report highlighting areas of strength and potential improvement relating to the iMatter questions

DIRECTORS:

Team Report

- *Directorate Report comprising an aggregated EEI Score and individual Team EEI scores
- •CEO Report comprising aggregated EEI score for all Directorates (except for the Chair's team)
- Components Report highlighting areas of strength and potential improvement relating to the iMatter questions

TEAMS:

- Team Report including EEI score
- Access their Directorate aggregated EEI score and report
- Components Report highlighting areas of strength and potential improvement relating to the iMatter questions

NOTE - iMatter Team Report, Team Action Plan and storyboard are NOT shared without permission of the team

iMatter Operational Leads will have access to all <u>iMatter</u> and <u>EEI</u> reports to provide support and mentorship when required



Staff Experience Continuous Improvement Framework Health Care Quality Strategy 2010 -Person-Centred, Safe & Effective **3 Quality Ambitions** MacLeod MacLeod: MacLeod: MacLeod: MacLeod: Health and Leadership **Engaging Managers Employee Voice** Integrity to the Values & Well-being Enablers/Healthy Working Lives Purpose Staff Governance SG5: SG4: Provided with a Continuously Standard Strands Treated Fairly & SG2: Improving & Safe Working SG1: SG3: Consistently, with Dignity Appropriately Trained & Environment, Promoting the WellInformed **Involved in Decisions** & Respect, in an Health & Wellbeing of Staff, Developed **Environment where** Patients and the Wider Diversity is Valued Community Sense of Vision, Purpose & Values Health & Well-being Support Clear, Appropriate & Timeously Communication Learning & Growth Performance Development Confidence & Trust in Management Partnership Working Valued as an Individual Effective Team Working Procedures Consistent Application of Employment Policy 8 Performance Management Visible & Consistent Leadership Role Clarity Access to Time & Resources Recognition & Rewards Listened to & Acted Upon Empowered to Influence Appropriate Behaviours & Supportive Relationships Assessing Risk & Monitoring Work Stress lobSatisfaction Staff Experience 90 Components Review 20 Workload KSF Core Dimensions C1 C1 C2 C4 C4 C6 C5 C6 C3 C3 C2 C1 C2 C2 C2 C6 C4 **C5** C6 C5



	atter
	~
	\geq
V	

Staff Experience Employee Engagement Components	iMatter Questions
Visible and Consistent Leadership Visible and Consistent Leadership Sense of Vision, Purpose and Values Role Clarity Clear, Appropriate and Timeously Communication	My direct line manager is sufficiently approachable
Visible and Consistent Leadership	I feel senior managers responsible for the wider organisation are sufficiently visible
Sense of Vision, Purpose and Values	I understand how my role contributes to the goals of my organisation
Role Clarity	I am clear what my duties and responsibilities are
Clear, Appropriate and Timeously Communication	I get the information I need to do my job well
Learning and Growth	I am given the time and resources to support my learning and growth
Performance Development and Review	I get enough helpful feedback on how well I do my work
Access to Time and Resources	I have sufficient support to do my job well
Recognition and Reward	I feel appreciated for the work I do
Confidence and Trust in my management	I have confidence and trust in my direct line manager
Confidence and Trust in my management	I have confidence and trust insenior managers responsible for the wider organisation
Listened to and Acted Upon	I am confident my ideas and suggestions are listened to
Listened to and Acted Upon	I am confident my ideas and suggestions are acted upon
Partnership Working	I feel involved in decisions relating to my organisation
Empowered to influence	I feel involved in decisions relating to my job
Empowered to influence	I feel involved in decisions relating to my team
Valued as an Individual	I am treated with dignity and respect as an individual
Effective Team Working	My team works well together
Consistent Application of Employment Policies and Procedures	I am treated fairly and consistently
Performance Management	I am confident performance is managed well within my team
Performance Management	I am confident performance is managed well within my organisation
Appropriate Behaviours and Supportive Relationships	I get the help and support I need from other teams and services within the organisation to do my job
Job Satisfaction	My work gives me a sense of achievement
Assessing Risk and Monitoring Work Stress and Workload	I feel my direct line manager cares about my health and well being
Health and Wellbeing Support	I feel my organisation cares about my health and well being
Additional Question	I would recommend my team as a good place to work
Additional Question	I would recommend my organisation as a good place to work
Additional Question	I would be happy for a friend or relative to access services within my organisation





Implementing iMatter in NHS Scotland

Managers Orientation Workshop

Slide 2

What we will cover today

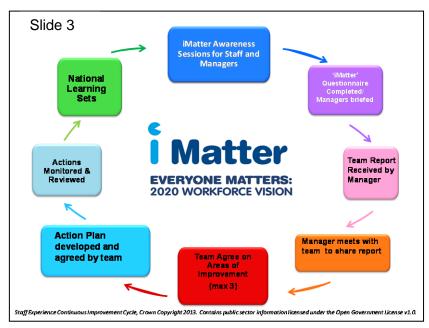
Aim: To enable team managers to effectively implement iMatter.

Objective:

Know how to effectively use the iMatter continuous improvement model with your team:

- · Understanding the annual iMatter questionnaire
- · Getting your iMatter Reports and how to interpret these
- Providing feedback to your team and developing your iMatter Team Action Plan and Storyboard
- Monitor and review your team progress

Matter







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



· Alternatively select the questionnaire and click on the view results tab



Slide 6

Viewing reports

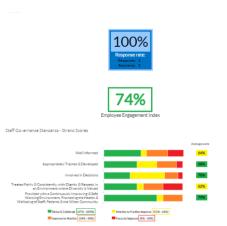
- By clicking on the report links from the dashboard, or selecting the View Results tab, you will be directed to the reporting page
- · You will see tabs for all the reports that are available to you
- · You can also download all the reports to PDF





Your Team report will show the following:

- Your Team Response Rate
- Your team Employee
 Engagement Index (EEI) the
 colour of the EEI 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



Slide 8

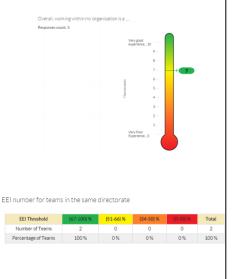
You will also see 3 sections in your report which are:

- · 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
- The colour of the score is reflected in the threshold key below each chart



Slide 9

- The thermometer shows the Team average for the overall experience of working within your organisation
- The final table shows the benchmark overview of your directorate - you can also access your aggregated Directorate report for a more detailed comparison by clicking on the Directorate report tab in your reporting screen





Slide 10 The Directorate report Matter All Teams will receive a copy of their Directorate report as long as your Directorate has also achieved a 83% response rate of 60% For teams who receive a report, this can be used for comparing your team feedback with your overall 72% Directorate and use this for benchmarking If you have not received a report this is an opportunity to see a report and consider using this when shaping your action plan with your team

Slide 11 Yearly Components Reports The yearly components table shows the 28 questions which are marked to the 20 Staff Experience Components which are linked to the 5 Governance Strands The report shows the average score received for each component The colour of the score is reflected in the threshold key below the table You will eventually be able to see a table with up to 5 year's improvements and comparisons





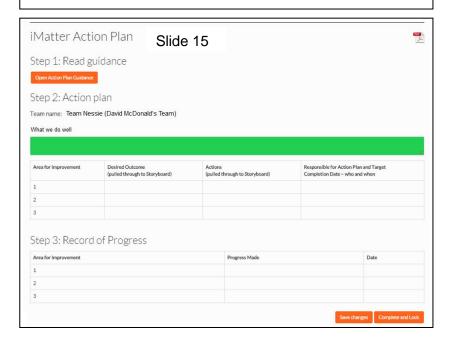
Slide 13 **Table Top Discussion:**

Consider the sample iMatter Team Report and discuss the following questions:

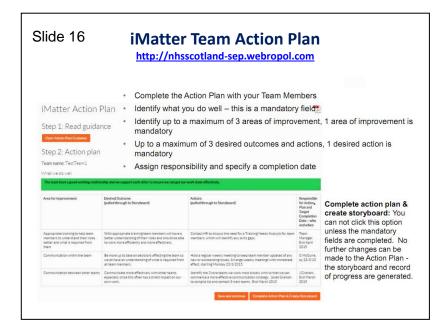
- 1. What does this Team Report tell you?
- 2. How can you practically get everyone in your team together to discuss the Team Report
- 3. How will you identify areas to action?

• Matter

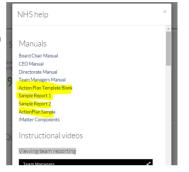
Slide 14 Action Plan You will have 4 weeks to feedback and reflect on your report prior to your Team Action Plan being completed You can access the Action Plan directly from your home page dashboard by clicking on the Action Plan icon **Select Questionnaire** NHS Scotland iMatter Questionnaire Report testing Team Test Team **Indicates Select Questionnaire** **Alternatively select the questionnaire and click on the Action Plan tab. **STAFF EXPERIENCE PORTAL** HOME NHS Scotland iMatter Questionnaire** NHS Scotland iMatter Questionnaire** **Manage team** View results* Action plan **Manage team** View results* Action plan







- If you have not received a Team report you will not be able to access the Action Plan from the system
- You can print an action plan template from your iMatter account under the help icon in the top right of the screen which includes Guidance on creating an action plan
- You will also see some sample reports which can be used to discuss with your Team - which area they think they do well and also which areas they feel some improvement would benefit them as a team
- This should be completed with the Team and kept within the department
- At the moment this cannot be saved onto your iMatter account



Slide 18

Storyboard

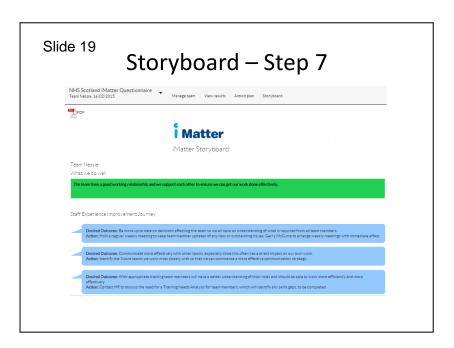
- As soon as you click on Complete Action Plan and Create Storyboard, the Storyboard will be generated
- You can access the storyboard directly from your home page dashboard by clicking on the Storyboard icon

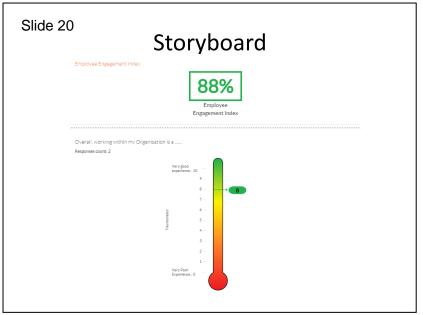


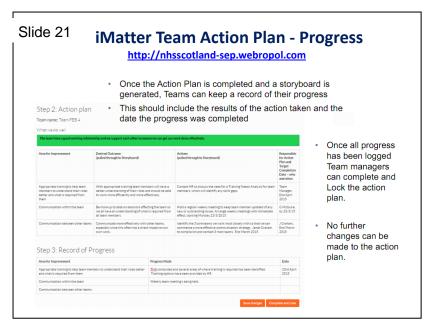
· Alternatively select the questionnaire and click on the Storyboard tab.



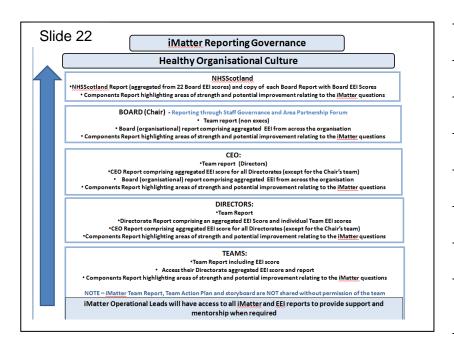


















Matter

National Support/Information:

iMatter Web-based Resource within NHS Staff Governance Website: http://www.staffgovernance.scot.nhs.uk/improvingemployee-experience/

Contents:

Frequently Asked Questions

Case Studies

Staff Experience Toolkit

iMatter Portal – online tutorials available for managers for navigating the IT system.

Slide 26

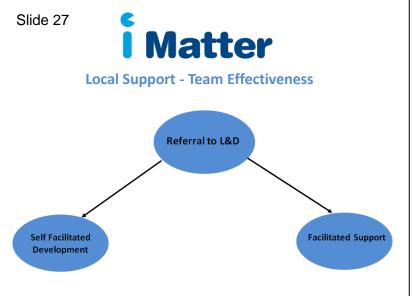


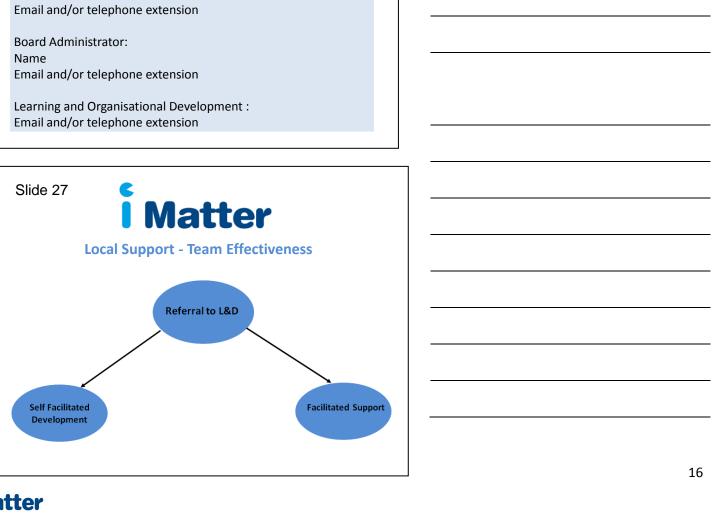
Local Support/Information:

iMatter Operational Lead and Administrator:

Name

Location







Matter	
EVERYONE MATTERS.	
EVERYONE MATTERS:	
Any questions?	
Thank you	



The Yearly Components table below will be included within your Team Results Reports to highlight areas of strength and potential improvement relating to the Staff Experience Components.

Staff Experience Bespoke Questions	Staff Experience Employee Engagement Components	Average Response Percentage
Q1. I am clear what my duties and responsibilities are	Role Clarity	86%
Q28. I would be happy for a friend or relative to access services within my organisation	Additional Question	78%
Q19. I would recommend my team as a good place to work	Additional Question	76%
Q20. I understand how my role contributes to the goals of my organisation	Sense of Vision, Purpose and Values	76%
Q14. My direct line manager is sufficiently approachable		
Q22. I feel senior managers responsible for the wider organisation are sufficiently visible	Visible and Consistent Leadership	76%
Q13. I feel my direct line manager cares about my health and well being	Assessing Risk and Monitoring Work Stress and Workload	73%
Q12. My work gives me a sense of achievement	Job Satisfaction	72%
Q18. My team works well together	Effective Team Working	71%
Q2. I get the information I need to do my job well	Clear, Appropriate and Timeously Communication	70%
Q27. I would recommend my organisation as a good place to work	Additional Question	69%
QS. I am treated with dignity and respect as an individual	Valued as an Individual	68%
Q15. I have confidence and trust in my direct line manager		63%
Q23. I have confidence and trust in senior managers responsible for the wider organisation	Confidence and Trust in my management	
Q9. I am treated fairly and consistently	Consistent Application of Employment Policies and Procedures	62%
Q21. I feel my organisation cares about my health and well being	Health and Wellbeing Support	58%
0.26. I get the help and support I need from other teams and services within the organisation to do my job	Appropriate Behaviours and Supportive Relationships	57%
Q16. I feel involved in decisions relating to my team		57%
Q7. I feel involved in decisions relating to my job	Empowered to influence	
Q17. I am confident performance is managed well within my team		
Q25. I am confident performance is managed well within my organisation	Performance Management	55%
Q3. I am given the time and resources to support my learning and growth	Learning and Growth	54%
Q4. I have sufficient support to do my job well	Access to Time and Resources	54%
Q11. I feel appreciated for the work I do	Recognition and Reward	53%
Q10. I get enough helpful feedback on how well I do my work	Ferformance Development and Review	52%
Q5. I am confident my ideas and suggestions are listened to		
Q6. I am confident my ideas and suggestions are acted upon	Listened to and Acted Upon	50%
Q24. I feel involved in decisions relating to my organisation	Partnership Working	39%

The average response percentage for each of the 20 Staff Experience Components will be collated and displayed in a table mapped to each of the 28 questions.

The Staff Experience Components will be ranked in order, highlighting the threshold each of the Components sit within.



Example Agenda/ Process for Team Feedback Session:

1. Welcome and Overview

- Welcome
- Check understanding of iMatter
- Purpose of team feedback session
- Teams' hopes and fears for Session
- Ground rules for how we will work effectively today (including confidentiality around sharing Team Report and content of discussion).

2. iMatter Team Report Discussion

Provide copies of Team Report and discuss in pairs/small groups/full team:

- What does our response rate tell us?
- What does the overall EEI score tell us?
- What areas are suggested as strengths (green/yellow)? Do you agree?
- What areas are suggested as improvement areas (amber/red)? Do you agree?



Example Agenda/ Process for Team Feedback Session:

3. The Team Action Plan

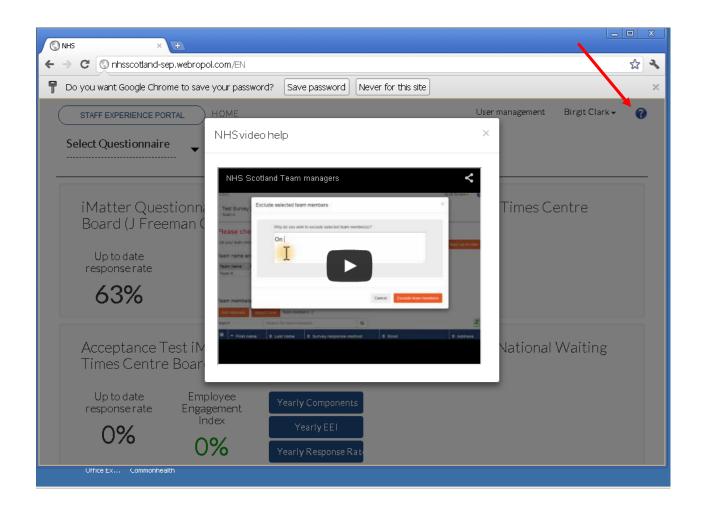
- Refer to guidance (video support is available)
- Prioritise our strengths and improvement areas (discussion or using votes/stickers etc.)
- Agree key strengths (minimum of 1)
- Agree key improvement areas (maximum of 3)

4. Next Steps and Close

- Confirm team manager will input agreed strengths and improvement areas. How will team members get a copy?
- Discuss storyboard and how the team will see this.
- Discuss roles/ resource needs to maintain strengths and work on the improvement areas.
- Agree how/when will monitor Team Action Plan.
- Remind team that this is annual process.



Using the? guidance on the webropol portal





iMatter Action Plan

Step 1 (Section 1)

Identifying Areas for Celebration and Improvement through team discussion around your report - (this was developed as a guidance section for managers when creating the team action plan).

This may be useful for those managers / team leads that do not regularly have team development discussions with their teams. If you would like support with this please contact your iMatter Op Lead or Board Administrator (or L&OD Department where appropriate).

A Suggested Process to identify your team priorities

- 1. Draw a road/river on paper, preferably in poster format and landscape. On left of page, indicate this is where the team currently are. On right hand side, indicate this is the team in the future.
- 2. Ask team what a good teamworking experience feels like. They should consider team behaviours, relationships, tasks, performance etc. (Prompt questions could be developed for this task). Comments should be displayed on the right hand side of the road/river map—the "future state" for our team.
- 3. So where is your starting point for your team on this journey? Before discussing your report each person is given a sticker/post-it note and asked to place the sticker on the road to show where they believe the team is on its teamworking experience journey. Take note of the differences/ similarities in views.
- 4. Your team should now review their report this is the starting point in your journey. Using the Yearly Components report, available as part of the team report, can be very helpful for this discussion.
- 5. It is important for the team to recognise its strengths. So based on your report / yearly components what should the team celebrate and continue to do? Team to discuss and record responses on flipchart (use post-its?).
- 6. The team should now identify the top three areas they would like to celebrate and continue. A sticky dot / tick exercise can be used for this. Your team should then agree a statement describing one area of success/strength which should be recorded in the Team Action Plan in the green box 'What we do well'. This will be pulled through and feature on the storyboard when entered on the portal.
- 7. The team should now identify those areas they would like to improve.



- 8. Once the main components are identified the team must now decide which of these areas they will use as the basis of the team action plan. It is recommended that each team prioritises **no more than three** on which to focus. Each team member is given five sticky dots / ticks to prioritise the improvement areas (components) on the flipchart they would like the team to focus on. Each team member can choose to place all dots / ticks on one area or to select up to five different areas.
- 9. The team have now identified a **maximum** of three areas they would like to prioritise. This information in the form of a brief description i.e. training, communication, SMT visibility, team working etc should be transferred to the Team Action Plan in the first box 'Areas for Improvement' and will be pulled through to the progress notes section and the storyboard.
- 10. For each agreed 'Area for Improvement' the following should be completed in the Action Plan (see example below):

In the 'Desired Outcome' box

• When our actions are complete what improvements will the team expect? What will this look like?

In the 'Action'

• What actions will we take as a team to make an improvement? Your team may wish to identify more than one action per improvement area.

In the 'Responsible for Action and Target Completion Date' box

- Include who will be responsible for taking action. Responsibility for an action can be shared by several team members. Target completion date should be realistic remember the improvement plan will only span an 8-9 month period.
- 11. Progress Update. It is important that you and your team stay focused on achieving the agreed actions therefore these should be discussed and updated regularly e.g. quarterly. Progress against each action should be entered onto iMatter Action Plan in the progress update section. (Managers not receiving a report will enter this on the action plan template saved in department files either electronically or on paper.)
- © Webropol Oy 2014



iMatter Action Plan

Step 2: Action Plan

Team name: 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.

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
1 Training & development	Appropriate training to help team members to understand their roles better and what is required from them.	Conduct a Training Needs Analysis for team members, which will identify any skills gaps.	Team Manager, End April 2015
2 Communication between 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 regular weekly meeting to keep team member updated of any new or outstanding issues	G McGuire 30/03/2015
3 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 we can commence a more effective communication strategy	J Graham, end March 2015

Step 3: Record of Progress

Area for Improvement	Progress Made	Date
1 Training & development	TNA conducted team wide over 2 week period. Training identified options to be discussed with HR/L&OD.	17/04/2015
2 Communication between the team	Team meetings held each Monday. Full notes kept and sent to those unable to attend so they are fully informed.	09/03/2015
3 Communication between other teams	Identified 3 main teams we work most closely with. Team managers agreed to hold joint monthly meeting to discuss issues affecting the teams.	17/04/2015



