i Matter

Manager Orientation Workshop
xxxx 201x
Facilitator Handbook

Contents

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iMatter | 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

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Managers' Orientation 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 and available via help icon on webropol portal
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 and manuals available for managers for navigating the IT system.	Using the ? help icon on the webropol portal

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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 iMatter and EEI reports to provide support and mentorship when required

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Staff Experience Continuous Improvement Framework

	Leadership / Engaging Managers / Employee Voice / Integrity / Health
Health Care Quality Strategy 2010 – 3 Quality Ambitions	**Person-Centred, Safe & Effective**

MacLeod Enablers / Healthy Working Lives	MacLeod: Leadership	MacLeod: Engaging Managers	MacLeod: Employee Voice	MacLeod: Integrity to the Values & Purpose	Health and Well-being
Staff Governance Standard Strands	SG1: Well Informed	SG2: Appropriately Trained & Developed	SG3: Involved in Decisions	SG4: Treated Fairly & Consistently, with Dignity & Respect, in an Environment where Diversity is Valued	SG5: Provided with a Continuously Improving & Safe Working Environment, Promoting the Health & Wellbeing of Staff, Patients and the Wider Community

Staff Experience Components / KSF Core Dimensions:

Component	KSF
Visible & Consistent Leadership	C1
Sense of Vision, Purpose & Values	C1
Role Clarity	C2
Clear, Appropriate & Timeously Communication	C1
Learning & Growth	C2
Performance Development & Review	C2
Access to Time & Resources	C2
Recognition & Rewards	C2
Confidence & Trust in Management	C6
Listened to & Acted Upon	C4
Partnership Working	C4
Empowered to Influence	C4
Valued as an Individual	C6
Effective Team Working	C5
Consistent Application of Employment Policy & Procedures	C6
Performance Management	C5
Appropriate Behaviours & Supportive Relationships	C6
Job Satisfaction	C5
Assessing Risk & Monitoring Work Stress & Workload	C3
Health & Well-being Support	C3

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Staff Experience Employee Engagement Components	iMatter Questions
Visible and Consistent Leadership	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 in senior 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

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Slide 1

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EVERYONE MATTERS:

Implementing iMatter in NHS Scotland

Managers Orientation Workshop

Welcome & Introductions (5mins)
Welcome to this Workshop session about iMatter, the new continuous improvement model that is being rolled out in our NHS Board and across NHS Scotland from January 2015. By now all 22 Health Boards have started their roll-out.

Confirm if introductions are needed.
You were all sent pre-reading (optional). The majority have attended an Awareness Session. At this stage in the cycle you will all have completed an iMatter questionnaire and should know your response rate.
Provide verbal feedback of current Board status and implementation (optional).
This session is in the format of a presentation and a practical interactive session. It is a safe environment to discuss any concerns you as team managers may have.
Q: So what is iMatter all about? -Ask question to group to gain understanding of their knowledge of iMatter.

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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

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Aim & Objectives of Workshop (5mins)
Over the next 1.5 hours, we are going to:
- The main focus of this session will be on the reports you will be receiving, how you will feedback to your team and the requirement for the team to develop a team action plan.

If you have any questions regarding the iMatter process to date we will be here for 30mins at the end of the session so we can answer your questions or record them on 'carpark' flipchart and we will get back to you.

Housekeeping
We are aiming to keep the session informal. Please ask questions – we will do our best to answer them or if we don't know the answer we will find out and get back to you.
This session is a good opportunity to discuss with managers from other areas how iMatter has been received so far, how you plan to feedback results and generally share best practice.
The most important aspect of this model is monitoring and reviewing the action plan using the IT system to make sure progress is made.

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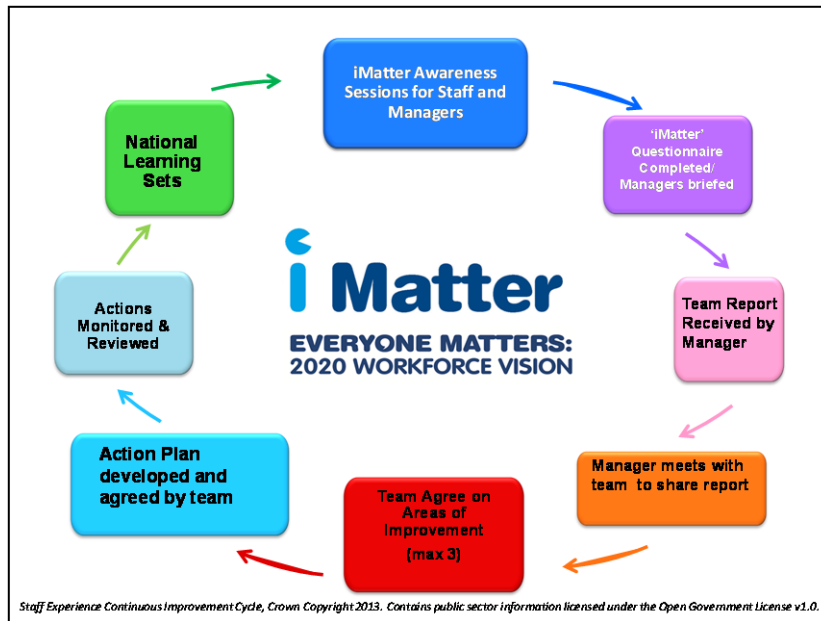
iMatter continuous improvement model. (5 mins)

iMatter is based on continuous improvement methodology – designed to focus on understanding and improving staff experience in NHSScotland. As you know it was designed by NHS Scotland staff for NHS Scotland.

Why the name iMatter – this was decided by Managers because they felt it was so important to get 'I' right.

Key principles:

- 'What is measured gets done'
- Ownership for this process, the results and the action plans sits with the team.
- It is acknowledged that currently this model is not suitable for multi disciplinary teams and there are ongoing discussions around this area
- This process will not sort out all your people management issues. HR/Occ Health processes will still always be required.

We are going to look at each of these stages in more detail, with a focus on the report and action planning part of the process.

You and your teams have already participated in the first two stages of the process. Awareness Sessions took place from xxxx. Around xxx staff and xxx managers attended out of xxx listed to receive the questionnaires. Quick check whether managers found these helpful.

In the second and subsequent years Awareness sessions will be used to reflect on the past year (what worked well, what could we have done better), how could we have got more out of the process – discuss.

Are you all aware of what your final response rates were? You can find out by login into the iMatter portal. As a health board we achieved a response rate of over 60% (amazing in comparison to staff survey response rate)

You are just about to enter the next stage of the process which means you will shortly be receiving your team report. The team reports take **5 weeks** to generate and will be available after xxxx. The team manager will receive an email advising that the report is ready and that it can be accessed electronically via the iMatter Portal.

Some teams may not receive a team report as teams did not get the required response rate.

If there is no report, focus is for team manager to meet with staff and consider reasons for response rate being <60%, and agree action plan for improving engagement. Teams are required to complete action plan and monitor same as all others. Most important is the outcomes, impact and changes year on year and therefore need to address any barriers and take actions.

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Understanding the Team Report (15 mins)
http://nhstest.webropol.com/EN/Account/Login?ReturnUrl=%2fEN Username is tea04@dom.com and password is test@123
It is possible to review a sample report on test site at the end of the session if anybody would like to view this.
The model works from bottom up, with all score aggregated to give an EEI score for the next level up.
In session share out the green and yellow coloured report to facilitate discussion on how to interpret the report.
This report provides an overview and nobody should get fixated on average scores. This opens up opportunity for conversations and able to be more focused.
The help ? Icon has useful manual and video clips explaining all aspects about the reports and how to create the action plan. It is worth spending some time reading through these manuals.

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When logging in to the staff experience portal on webropol, managers will see a front page looking like this.
This demonstrates the different ways you can access your report and results.
    Draw their attention to the following:
*   **your team's completion rate**.
    Remember you have to achieve 60% response rate to get a report and 100% for teams with 4 or less members.
*   the overall team **employee engagement index (EEI) score.** The EEI score is generated based on the responses to the first 28 questions in questionnaire. System collates the score. Good time to point out that the scoring system has been validated by WoS University.
    The model works from bottom up, with all scores aggregated to give an EEI score for the next level up.
    It is important to consider that in the second year the Employee Engagement Index can go down as well as up – this is not necessarily a sign that the action plan has not been successful...it can also reflect that staff are more engaged in the process and are more willing to be honest and address issues at a deeper level
*   **Red, Yellow, Amber, Green colour coding–** colour coding used to support response rate and outcomes.
    The reports provide an overview and nobody should get fixated on average scores. This opens up opportunity for conversations and able to be more focused.

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This shows the different reports available at team manager level:
Team report
Directorate report
Yearly EEI & Response rates
Yearly Components
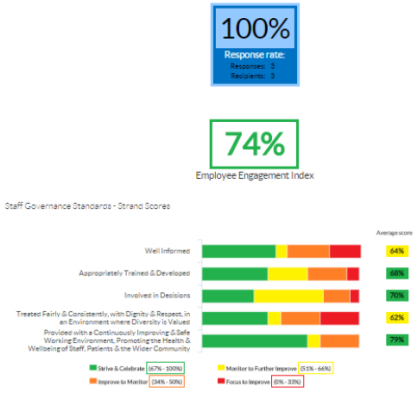
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The Team Report
In order to enable managers to feedback results to their teams they will receive a Team Report looking like this.
The response rate includes the number of recipients and the number that responded as a %.
The EEI score based on the responses received from the 28 questions.
How the team is doing in relation to the **5 strands of the Staff Governance Standard.**
All questions have been linked to the staff governance strands. Specific questions correlate with each of the strands to give a sense of how staff feel in relation to each standard.
What to consider in a report:
Reports can display disparity in how staff feel depending on their experience or even the day they have had when they completed the questionnaire and could therefore reflect between completion on good/bad days. What does it mean when you review the report. Asking staff whether this is a good reflection is a good start.

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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
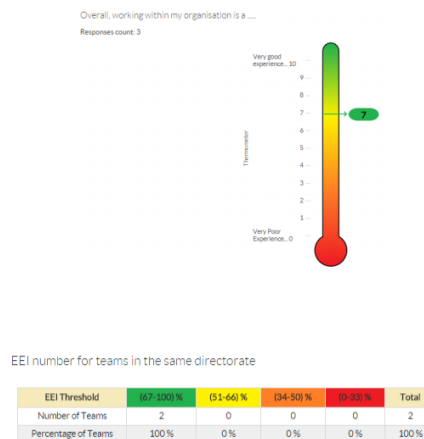
- Results are available for each of the questions. The questions are presented under 3 headings:
  - As an Individual
  - My Team / Line Manager
  - My Organisation – Director/CEO/Non-Executive Board level

5 questions ask about having sufficient support, which is replicated in all 3 areas. Note that responses for strongly agree/agree and disagree/strongly disagree have been collated together. For each question an average score has been collated. Explanation for calculation used in average score is given on report and to view breakdown of responses in % hover over each colour.
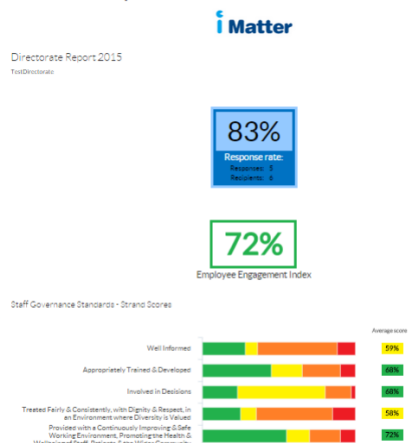
The 29th question provides an indication of how the team feels overall about their experience at work. This is shown on the thermometer at the final page of the report and was scored from 0-10 in the question. The pilot shows this typically correlates strongly with the EEI score, as shown in the example with an EEI score of 74% in yellow matching the score of 7 in yellow on the thermometer. This means that the answers to questions 1-28 are a reliable predictor of the answer to question 29, and vice versa.

At the end of the report is a table demonstrating all the teams in a Directorate that received a report and the threshold EEI. Each team can see how they compare with other teams, but there are no team names indicated.

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- 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

The Directorate Report
The model works from bottom up, with all scores aggregated to give an EEI score for the next level up.
So all the teams under each director that received a report and therefore an EEI score are aggregated (collated) to calculate an overall directorate EEI score. Effectively this combines all the responses received from each team to give one overall report.
All team managers, with or without a report will be able to view this report.

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- All Teams will receive a copy of their Directorate report as long as your Directorate has also achieved a response rate of 60%
- For teams who receive a report, this can be used for comparing your team feedback with your overall 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

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Yearly Components report displaying responses in order of ranking from highest to lowest, including the iMatter question and the corresponding staff experience employee engagement component.

This is a very useful format for staff to review areas to celebrate and areas for improvement.

When considering these for the action plan, areas that will be most relevant to the team and have the best outcome or most impact should be selected. It does not need to be the highest or lowest scoring. It is actually recommended to focus more in the middle range.

If the report is all green and managers struggle to identify an area for improvement, consider how the team will maintain and possibly improve an area they wish to celebrate.

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Filling out a survey again! So what?! A word of caution for managers… 2 mins
Sound familiar? This is NHS Scotland's chance to listen to the feedback, respond and act positively to make things better for staff which in turn improves patient and customer experience. How we ask for feedback is just as important as what we ask!

And doing nothing with staff feedback is NOT an option with iMatter.

Remember the feedback and stats are only a snapshot in time and may depend on how the individual felt at the time.

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?

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- **Table Top Discussion (Exercise) (30mins)**
We will look at the next 3 stages of the process. From receiving the report w/c xxxx you have until w/c xxxx to and reminder emails will go out:
- Meet with team and share / discuss report. This is an opportunity to check whether the data within this Team Report reflects the realities of working in our team (within 4 weeks)
- To discuss and agree team strengths and note which ones we want to celebrate (minimum of 1)
To discuss and agree team areas for development and what we want to commit to address collectively (maximum of 3)
Develop as a team your action plan and enter details onto iMatter portal.
Sounds like a long time but as many of you managing large teams know you will need this length of time.
Small Group Exercise – 15 mins for the task (suggestion of 3 groups):
Provide each group with a sample Team Report and ask them to discuss the questions on this slide.
Delegates need to be prepared to feedback their views and ideas to the whole group.

Feedback - Suggest this is done in groups by Facilitators (15 mins) – check they have picked up on the following points:
Response rate
What EEI score means
Getting an overall feel of the Green/ Yellow/ Amber/ Red categories and what this flags in terms of strengths and areas for improvement
What the thermometer tells them

Flipchart (optional – use post-its)
How will you practically get everyone in your team together to discuss the Team Report?
What barriers might you face?
Some considerations include:
Straightforward discussion around each of the questions

Focus on colours (green/ yellow/ amber/ red)
Wider process including thinking about team vision/ goals/ objectives etc (will be available in the Staff Experience toolkit)
Preparing some analysis in advance and using a summary (slides) to focus discussion a bit more
Who leads the discussion? Manager facilitates discussion or other team member or someone external to the team
Using staff and/or patient stories to bring in qualitative data to consider
Using other relevant statistics to bring in other information to consider e.g. sickness levels, quality indicators etc
Outputs need to be in the form of strengths (at least one) and areas for improvement (minimum 1 and maximum of 3) and the team manager will be responsible for entering these into the iMatter Team Action Plan via the iMatter Portal

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This shows where to access the action plan for completion from your home page.

Slide 15

Example Action Plan Template (on iMatter Portal) (Step 2) – 5 mins

Alternatively demonstrate this on the test website and delete slide!

The team manager will complete this Team Action Plan on the iMatter Portal after the Team Feedback session as it is the responsibility of the team manager to drive this aspect of the process (reinforce feedback is to be done in weeks 9-12 of the iMatter model – xxxx - xxxx and planning actions xxxx - xxxx)

 It is recommended that the team manager and their line manager engages in conversation about their EEI score and Team Action Plan as part of local communication processes and particularly KSF PDR/ Exec appraisal processes.

iMatter Team Action Plan
http://nhsscotland-sep.webropol.com

iMatter Action Plan

Step 1: Read guidance

Open Action Plan Guidance

Step 2: Action plan

Team name: TestTeam1

What we do well

- Complete the Action Plan with your Team Members
- Identify what you do well – this is a mandatory field
- Identify up to a maximum of 3 areas of improvement, 1 area of improvement is mandatory
- Up to a maximum of 3 desired outcomes and actions, 1 desired action is mandatory
- Assign responsibility and specify a completion date

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

Complete action plan & create storyboard: You can not click this option unless the mandatory fields are completed. No further changes can be made to the Action Plan - the storyboard and record of progress are generated.

Save and continue   Complete Action Plan & Create Storyboard

Managers will be required to produce a copy of the Team Action Plan for all team members (highlight this is different from the pilot and demonstrates ownership by the team), reinforcing that it's everyone's job to work on improving staff experience and not just the managers responsibility.

You will need to discuss confidentiality with the team as the principle is not to share this information outwith the team unless this is agreed by the team itself. (Requires majority to agree, not all)

Note that as soon as the fields in the Team Action Plan are completed and locked, the system will send the information in the appropriate fields to the team's Storyboard including the thermometer.

Few points to note here:

Some managers were encountering some difficulties when completing the action plan on the staff experience portal (webropol).

Hopefully the following advice will help managers complete the action plan:

1. Make sure the PC is IE8 or has Google Chrome

2. Login to http://nhsscotland-sep.webropol.com (save this page as a favourite)

3. Open the action plan

4. 'What we do well' needs to be entered in the green box by clicking in it – this is not obvious.

5. All boxes in the row need to be completed, including 1. Area for improvement etc.

6. You need to enter at least one area of improvement and what you want to celebrate in the green box

7. The number of characters are limited and this was intentional to ensure action plans are concise

8. Enter who will take the action and by when

9. The system times out after 60 minutes. You are advised to save your entries on a regular basis. This will allow you to continue editing any changes.

10. When ready click 'complete and lock' only once (don't double click) and no further changes can be made. The screen doesn't seem to change and it won't say anything that it is complete, which might be confusing. (If you keep trying to save, it will ask you to update the progress notes, which should only be updated once actions are progressed)

11. To access your storyboard, click on the separate tab at the top. You can save the action plan and/or the storyboard to PDF to send to staff and print off to display in your department.

This slide is a completed mock-up of the iMatter Team Action Plan which is on the iMatter Portal. Only managers and Directors will have access to the iMatter portal.

An example has been added.

Please ignore Step 3: Record of Progress just now, because this should only be getting completed once you have progressed your actions as shown in a later slide.

What is important to know is that if after you entered step 2 and clicked complete and lock, if you continue to click complete and lock, the system will ask you to enter step 3. Only enter here after you have met to discuss progress.

Step 2 action plan cannot be changed once completed and is the plan to work from, viewed in the storyboard.

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- 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

NHS help

Manuals

Board Chair Manual
CEO Manual
Directorate Manual
Team Managers Manual
Action Plan Template Blank
Sample Report 1
Sample Report 2
ActionPlan Sample
iMatter Components

Instructional videos

Viewing team reporting
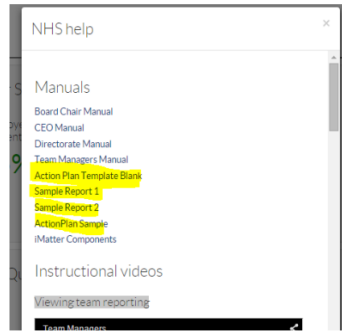
Team Managers

It might be helpful to tell all managers what happens if a team does not get a report and what they will be required to do.

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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

STAFF EXPERIENCE PORTAL	HOME	Team 1 Manager
Select Questionnaire		

NHS Scotland iMatter Questionnaire for Team: TestTeam1

Up to date response rate	Employee Engagement Index	Team Report 2015	Action Plan
100%	74%	Directorate Report 2015	
		Yearly EEI & Response Rates	STORYBOARD

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

STAFF EXPERIENCE PORTAL	HOME				Team 1 Manager
NHS Scotland iMatter Questionnaire TestTeam1, 22/02/2015		Manage team	View results	Action plan	Storyboard

This shows where to access the storyboard once the action plan is complete & locked.

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Storyboard – Step 7

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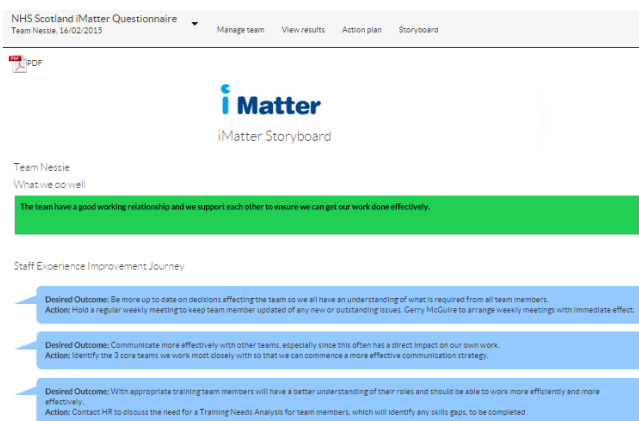Team Nessie, 16/02/2015   Manage team   View results   Action plan   Storyboard

PDF

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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 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.

The storyboard contains outcomes and desires which were added to the Action Plan.

A mock Storyboard is provided here to give you an idea of what this will feature. The key contents are;
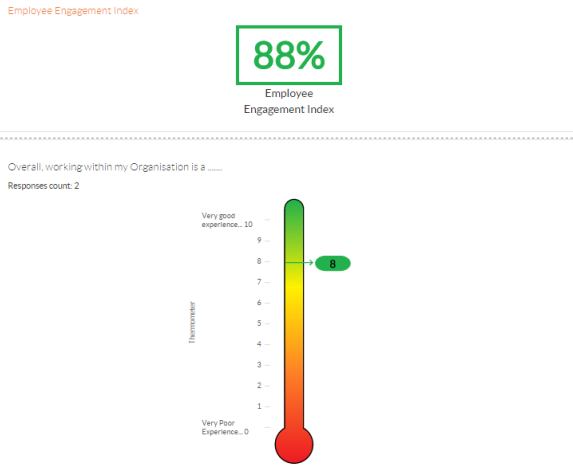
The team name

Strengths/ areas for celebration

EEI score

the thermometer

Agreed improvement areas in term of outcomes and associated actions.**The Storyboard is an opportunity for teams to visually demonstrate their continuous improvement journey year on year. Managers will be encouraged to display their storyboards for staff to view.**

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Slide 20

Storyboard

Employee Engagement Index

88%

Employee
Engagement Index

Overall, working within my Organisation is a ....
Responses count: 2

The iMatter Storyboard 5 mins

It also shows your Team EEI and overall result of working within the organisation from the questionnaire results

• A PDF of the storyboard can be downloaded and printed

Storyboard created and shared with teams xxxx date

Alternatively demonstrate this on the test website and delete slide!

Slide 21

iMatter Team Action Plan - Progress
http://nhsscotland-sep.webropol.com/EN/Account/Login

• Once the Action Plan is completed and a storyboard is generated, Teams can keep a record of their progress
• This should include the results of the action taken and the date the progress was completed

• Once all progress has been logged Team managers can complete and Lock the action plan.

• No further changes can be made to the action plan.

Team Monitoring (Step 3) 2 mins

Alternatively demonstrate this on the test website and delete slide!

The 3rd step of the Action Plan is designed to ensure that all managers review their Team Action Plan on **quarterly basis (**flexible and what suits the team) to check progress and impact. It is suggested that this could be done as part of regular team meetings/ team brief/ huddles (local Board processes) but at least on a quarterly basis.

Managers are asked to evidence that they have reviewed the Team Action Plan on the iMatter Portal (insert dates/times met and short update on progress).

Xxxx (date) to xxxx the Team managers are required to provide a written progress report to the Line Manager/Director on delivery against actions.

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iMatter Reporting Governance
Healthy Organisational Culture

NHSScotland
- NHSScotland Report (aggregated from 22 Board EEI scores) and copy of each Board Report with EEI Scores
- Components Report highlighting areas of strength and potential improvement relating to 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 for 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)
- Component 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 iMatter and EEI reports to provide support and mentorship when required

Board and NHS Scotland monitoring/ governance <u>10 mins</u>

Refer to HANDOUT of iMatter Reporting and Governance in booklet.

Reminder who sees reports and Governance arrangements in place, approved by SWAG.

Team managers will use iMatter reports as part of Staff Governance monitoring tool.

The focus of monitoring/ governance is that we are creating a healthy organisational culture at both a Board level and across NHS Scotland as part of meeting the 2020 Everyone Workforce Vision.

All reports are generated by the IT system (Webropol) and are made available via the iMatter Portal.

All levels shown in the slide will receive a yearly components report highlighting in order of ranking from top % to lowest % responses received to each question aligned to the respective staff experience components.

At team level, Team Managers will have their own iMatter Team Report with EEI score and thermometer. This iMatter Team Report and the subsequent Team Action Plan is not shared. The Team Manager will see the iMatter Directorate Report.

For Directors, all the individual team EEI scores within their Directorate are aggregated to produce a Director's EEI score. The Director also gets an iMatter Directorate Report that shows all the EEI scores for the teams in the Directorate.

All Directors' EEI scores are then aggregated to CEO level and the CEO will receive an aggregated EEI score. The CEO will also get an iMatter Board Report which show all the EEI scores for his/her Directors.

The Chair will run iMatter with non Execs and CEO, and establish their own EEI score. This EEI score will then be added to the CEO overall score and that will provide a Board EEI Report.
The Scottish Government (national report) will see a copy of each Board EEI/report and then the aggregated 22 EEI Score will become the NHSScotland EEI score.

The above will allow benchmarking to happen at many levels , which is very different to what we currently have with the National Staff Survey and encourage Personal Development Review discussion and link ultimately, (in time) to performance as happens in other organisations.

Note that the iMatter Op Leads will have access to all Report and EEI scores. Local governance reporting – state who has responsibility for iMatter in our Board (include name) and what the local governance arrangements are for monitoring iMatter implementation, outputs and outcomes

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Slide 23
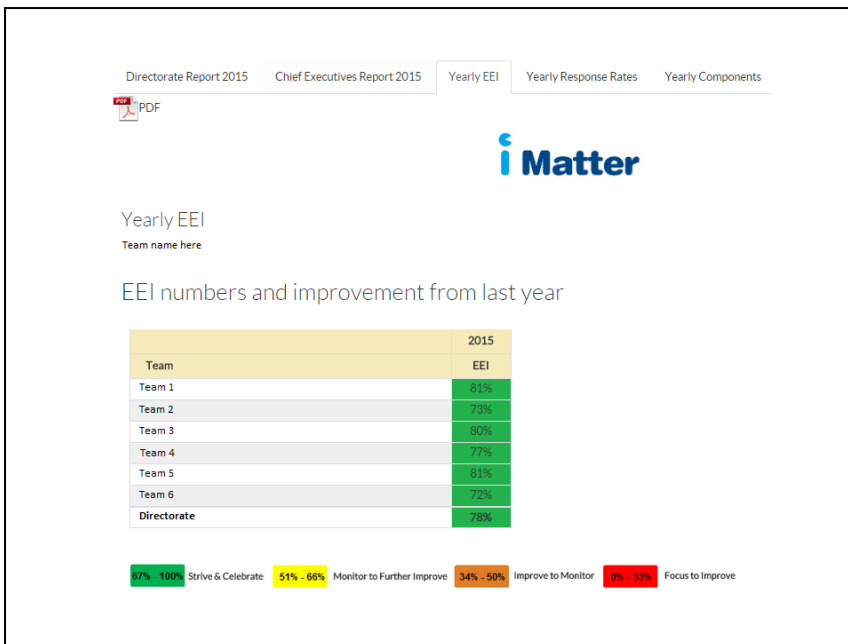
5 minutes
Directors are able to see the EEI score and response rate of all the teams that report into them. Information will be added each year demonstrating how engagement and responses have changed each year.

The CEO will see the EEI score and response rate for every Director.
The Chair will also see the EEI score and response rate for the CEO's team.

Slide 24

holding slide – Acknowledge that we have provided a step by step guide around the full iMatter continuous improvement model.
The National Learning Sets will bring people together to discuss and share best practice around iMatter in a supportive learning environment.

Slide 25

Further Support – National - 2 mins
Signpost to further support/ information – national – as per the slide contents.

Slide 26

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Local Support/Information:

iMatter Operational Lead and Administrator:
Name
Location
Email and/or telephone extension

Board Administrator:
Name
Email and/or telephone extension

Learning and Organisational Development :
Email and/or telephone extension

Further Support – Local Board - <u>2 mins</u>
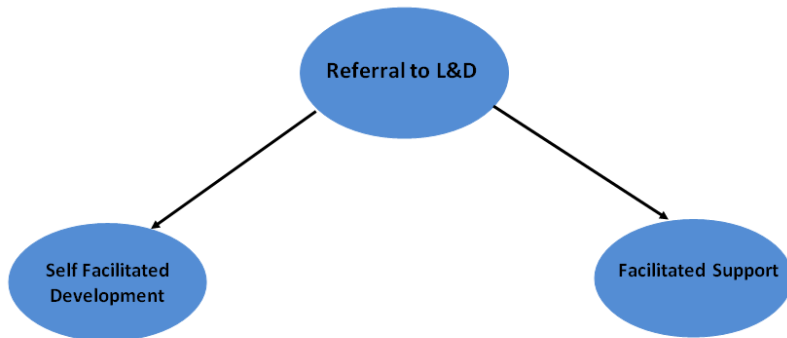iMatter Op Lead contact details
Process and contact details for team development support
Availability and access to paper based and electronic support materials i.e. refer to support pack

Slide 27

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Local Support - Team Effectiveness

Referral to L&D

Self Facilitated Development

Facilitated Support

Team Effectiveness - Further support – ? mins (optional or insert your own)
For Line managers/teams seeking support in developing team effectiveness and staff engagement, Line managers will have access to a Toolkit which will contain suggestions for approaches that could be undertaken by the Team and facilitated by the Line Manager.
Where Line Managers feel the need for external facilitation, support can be **requested**. This can include support from a Team facilitator to help you identify interventions to support you and your team to progress with your action plan. Further facilitated support can include signposting to relevant training / development programmes e.g. People Management Getting it Right, Challenging Conversations, Values based recruitment. Also one to one coaching for the line manager. Support can also be sought from the HR and Occupational Health Teams in developing appropriate initiatives.

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Slide 28

Holding slide for pause and any questions

So that provides you with an overview of how to interpret iMatter reports, planning feeding back to your teams and developing your action plans. Are there any questions? (Use the FAQs and Local iMatter Implementation Plan to answer accordingly).

To recap on the earlier message, NHSScotland continues to seek to support the improvement of staff experience. Accordingly iMatter is positioned as a key component of the 2015/16 2020 Workforce Vision Implementation Plan.

NB: Ensure you take time to review the FAQs before delivering the session. These have been developed via the iMatter Operational Leads and their experience of working with colleagues in Boards around this agenda

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	Visible and Consistent Leadership	76%
Q22. I feel senior managers responsible for the wider organisation are sufficiently visible		
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%
Q8. 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	Confidence and Trust in my management	63%
Q23. I have confidence and trust in senior managers responsible for the wider organisation		
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%
Q26. 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	Empowered to influence	57%
Q7. I feel involved in decisions relating to my job		
Q17. I am confident performance is managed well within my team	Performance Management	55%
Q25. I am confident performance is managed well within my organisation		
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	Performance Development and Review	52%
Q5. I am confident my ideas and suggestions are listened to	Listened to and Acted Upon	50%
Q6. I am confident my ideas and suggestions are acted upon		
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.

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Example Agenda/ Process for Team Feedback Session:

1. Welcome and Overview

- o Welcome
- o Check understanding of iMatter
- o Purpose of team feedback session
- o Teams' hopes and fears for Session
- o 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:

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

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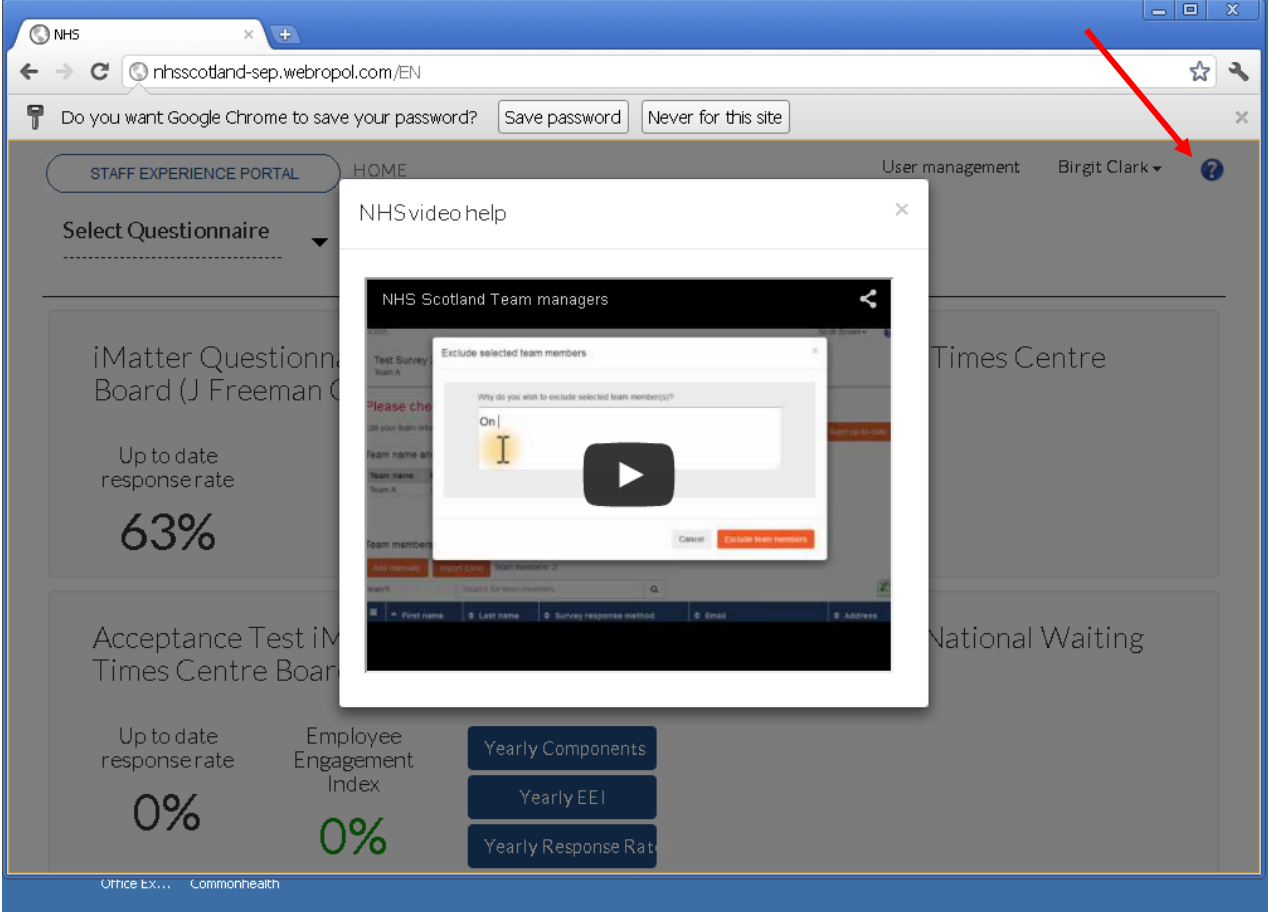## Example Agenda/ Process for Team Feedback Session:

3. The Team Action Plan

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

4. Next Steps and Close

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

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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.

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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.)

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iMatter Action Plan

Step 2: Action Plan
Team name: Team Nessie

<div style="background-color:green">

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.

</div>

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

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