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**Managers’ Orientation Workshop: Pre-course reading**

**About this handout**

This handout supports the iMatter Managers’ Orientation Workshop and provides information what iMatter is, how it was developed, and what you need to know.

The workshop will focus on understanding and interpreting iMatter Reports, how to feedback results to your team and create your action plan.

All of the information contained in this handout and the workshop was developed with colleagues from other NHS Boards and provides a consistent message to all Boards. Additional information will be provided in a support pack.

**About iMatter**

iMatter is the Staff Experience Continuous Improvement Cycle that is being rolled out in all NHS Boards in Scotland from January 2015.

Designed to understand and improve staff experience and employee engagement, it was developed **by** NHSScotland staff **for** NHSScotland.



**Staff Experience and Employee Engagement**

A group of NHS Boards worked in partnership with the Scottish Government on a project called the National Staff Experience Project. After researching best practice of Staff Experience, NHSScotland adopted the following definition of the term:

**“A workplace approach designed to ensure employees are committed to their organisations’ goals and values, motivated to organisation success, and are able at the same time to enhance their own sense of wellbeing”**- (Engaging for Success 2009 authors; Nita Clarke and David MacLeod)

A total of 1,200 staff in three Boards were asked how they would define positive staff experience. These responses were mapped against other standards and best practice indicators as shown in the table of 20 staff experience components. Please review these components. . [..\..\iMatter Promoters\SE Framework-EEI Components-iMatter questions.ppt](file:///\\hcimax\Common\iMatter%20Promoters\SE%20Framework-EEI%20Components-iMatter%20questions.ppt), which also demonstrates the iMatter questions aligned to one of the 20 staff experience employee engagement components.

Staff attending the Awareness Raising Sessions were also asked what they understood by the term ‘employee engagement’, why it is important and what you would see, hear or experience if colleagues were engaged. Comments were recorded on a flipchart and collated. More information is included in Appendix 1.

In summary, **staff experience** is a term to describe the extent to which employees feel motivated, supported and cared for at work. This is reflected in **levels of engagement**, motivation and productivity.

**Recognising the importance of Staff Experience**

In 2011, NHSScotland was planning the delivery of the national Quality Strategy, the forerunner to the 2020 Vision, and they realised the potential benefits for patients and staff if employee engagement improved.

NHSScotland has strategically recognised the importance of staff experience and the implementation of the iMatter continuous improvement model.

In 2012/13, the Scottish Government worked with over 3,000 staff in four pilot Boards (NHS Tayside, NHS Forth Valley, NHS Dumfries & Galloway and NHS NWTC) to develop and test a framework for measuring Staff Experience, recognised as being the key driver of employee engagement.

The success of the pilot, validated by the University of West of Scotland, has led to the development of the iMatter model and its inclusion as a 2020 Workforce Vision – the ‘Everyone Matters’ priority under the Healthy Organisational Culture strand.

By promoting openness and transparency about staff experience at work, iMatter supports both the NHSScotland and Board Values.

This is closely linked to NHS Scotland Staff Governance Standards and reciprocal rights and responsibilities. The Staff Governance Standards ensure that staff are:

* well informed;
* appropriately trained and developed;
* involved in decisions;
* treated fairly and consistently, with dignity and respect, in an environment where diversity is valued; and
* provided with a continuously improving and safe working environment, promoting the health and wellbeing of staff, patients and the wider community.

You can access further information on the Staff Governance Standard at: <http://www.staffgovernance.scot.nhs.uk/what-is-staff-governance/staff-governance-standard>

**Optional to include Board Vision and Values (example by NWTC below)**

The Staff Governance Standards and NHSScotland values closely correlate with the NWTC Values:

* treat everyone with dignity and respect;
* take responsibility to do our jobs well;
* demonstrate our commitment to quality;
* work effectively with others in teams; and
* display a “can do” attitude at every opportunity.



**Benefits of Employee Engagement in the NHS**

So what does the research base say about employee engagement and the NHS? There is strong evidence of the positive impact high employee engagement has on both staff and patient experience.

Some of the specific benefits include:

* higher staff morale and motivation;
* less absenteeism and stress;
* greater efficiency, productivity and effectiveness; and
* stronger financial management.

From a patient’s perspective and thinking about clinical teams, evidence shows that higher engagement and improved staff experience results in:

* enhanced patient experience;
* fewer errors;
* lower mortality; and
* lower infection rates.

For more information, visit:

[employee-engagement-nhs-performance-west-dawson-leadership-review2012-paper.pdf](file:///\\hcimax\Common\iMatter%20Promoters\iMatter%20Manager%20session\employee-engagement-nhs-performance-west-dawson-leadership-review2012-paper.pdf)

<http://www.mas.org.uk/positive-work-culture/wellbeing.html>

<http://www.ipa-involve.com/resources/publications/diverse-voices/>

<http://www.lansons.com/download-britain-at-work/>

For all areas, whether patient facing or not, it is likely that anyone who receives our services will benefit similarly to patients from the improvements that come as a result of greater engagement.

**The Staff Experience Continuous Improvement Cycle explained**

iMatter is a tool which leads to discussion and action around positive staff experience in your team.

In the workshop, each section will be discussed in turn to clarify what this means for you as a team manager.

The Continuous Improvement Cycle:

* is for use at team level to help promote openness and transparency about each individual’s experience at work
* supports your team’s development over time
* is designed to help line managers understand what it is like for individuals at work, in teams and within the NHS Board
* provides a measure of staff experience and based on the principle from the quality improvement world “what gets measured, gets done”
* recognises that there is already a lot that is good about our teams and our workplace, but we should always be looking to learn and improve.

Ownership of the data and of planning improvements in what you do on a day-to-day basis sits with line managers and teams.

As Team Managers, you need to be aware that:

* iMatter only works with teams defined by line management relationship and focuses particularly on the relationship between employees and their line manager. Best practice research supports that this relationship is critical to employee engagement. iMatter is currently **not** for multidisciplinary teams.
* What it can’t do is sort all people management problems, e.g. performance management, formal HR processes etc, but could be the catalyst for improvement.

Creating conditions for optimal performance in your team is already your responsibility as managers; iMatter gives you the focus to make this more of a priority in your management role.

**The iMatter model – how it works**



iMatter involves completing a short online questionnaire of 29 questions within a three-week timeframe. The survey has three sections about your experience:

* about you in your role;
* in your team and with your line manager; and
* of your organisation.

The questions are linked to what we know are the elements of good staff experience and the five strands of the Staff Governance Standard. (See pages 2-3)

The questionnaire is available electronically or in paper copy, and takes no more than 10 minutes to complete. Responses are confidential and will not identify any individuals.

To ensure responses provide an accurate reflection of the staff experience at work, it is important for as many members of the team as possible to complete it. Teams of five or more people require a 60% response rate to receive a validated report; teams with less than five people require 100% completion to ensure their responses are validated and remain anonymous.

The survey is an important first step that will be repeated annually, in an ongoing process of continuous improvement for your team.

**The seven steps involved in the iMatter model**

The iMatter cycle translates into seven practical steps over 26 weeks.

1. Local administrators (include names) upload team data to iMatter as agreed with Divisions / Departments and Board iMatter Leads (name). This will have been done at least 4 weeks in advance of your Division’s/Department’s “survey distribution” date.
2. An email will be sent by the system four weeks in advance of “distribution of questionnaires” asking **team managers** to log in to review and confirm team member’s details and indicate if they should receive an electronic or paper questionnaire. Managers need to consider if staff on long-term sick or leave should be excluded and discuss with staff on maternity leave options for completing a questionnaire.
3. **Staff** log on to the system on receipt of e-mail with login details and complete online **or** complete and return the paper questionnaire in the Stamped Addressed Envelope provided. Either should be done in private.
4. During the three-week window for completion, the team manager should log in to review the team’s response rate and encourage participation.
5. Once the completion window has closed, reports will be generated over five weeks and thereafter made available to team managers and Board iMatter leads. Managers should discuss with their iMatter leads if they have any concerns. Attendance at this Managers Orientation Workshop is at this point in the process to ensure managers are clear on how to get the best from iMatter.
6. Reports should be shared and discussed by team managers with team members over the following four weeks, and used as the basis for developing a team action plan over the following eight weeks, outlining a maximum of three improvements the team will make in the year ahead.
7. Once action plans have been in place for a number of weeks, teams should meet to review progress and document this using the action plan template, available on the staff experience portal.

**Finally**

Taking each section in the iMatter cycle in turn, the workshop session will cover what is expected of the team manager – and how to effectively implement iMatter. The workshop will focus on understanding the team reports and preparation for sharing these with the team to identify actions.

Before attending your session, please login to the iMatter portal to review your team response rate and you will note a tab to record the action plan / storyboard has now been added. The report will be displayed on this portal after xxxx date.

Facilitators will be available for 30 minutes after the session to answer any particular questions you may have or that are raised during the workshop.

**Further information:**

**iMatter Web-based Resource** within NHS Staff Governance Website: <http://www.staffgovernance.scot.nhs.uk/improving-employee-experience/>

<http://www.staffgovernance.scot.nhs.uk/monitoring-employee-experience/>

**Key contacts on iMatter:**

Name

iMatter Operational Lead

[email](mailto:Birgit.clark@gjnh.scot.nhs.uk) or phone extension xxxx or

Name

iMatter Board Administrator

[email](mailto:paula.wood@gjnh.scot.nhs.uk) or phone extension xxxx

**And L&D:**

Name

Learning & Development Manager

[email](mailto:Birgit.clark@gjnh.scot.nhs.uk) or phone extension xxxx

Name

L&D / iMatter Administration Assistant

[email](mailto:Birgit.clark@gjnh.scot.nhs.uk) or phone extension xxxx **Appendix 1 (NWTC examples from Awareness sessions)**

**What do you understand by the term ‘Employee Engagement’?**

**Good team dynamics**

**Noisy**

**Negative tension**

**2-way communication**

**Knowing what your role is and guidelines to follow**

**Take pride in your work**

**Working as a team**

**Keeping staff well informed**

**Feeling valued**

**Feels like a positive place to work**

**Enjoying coming to work**

**Working in harmony**

**Coming up with solutions**

**Knowing what is expected of you/employer**

**Better understanding of each other’s needs**

**Having a contract**

**Happy/positive**

**Taking ownership**

**Working for same goal**

**Issues listened to and acted upon**

**Asking people about their work**

**Being involved**