

iMatter Team Engagement Guide

January 2025

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5. **Introduction**

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

This guide has been designed to provide guidance and support for line managers taking forward engaging action planning discussions with their team(s) following publication of their iMatter report.

iMatter gives us an insight to the experiences of our staff, and, alongside other programmes such as Investors in People, we can start to build a better picture of what influences a positive experience at work. However, discussions with our staff to get beneath what these programmes and reports tell us, supports positive, person-centred engagement going forward.

Engagement is so important because it provides insight into the lived experiences of your team members. When employees feel valued and heard, they’re more likely to contribute their best, collaborate effectively, and remain dedicated to the organisation.

You’ll also find, at the end of the guide, links to development programmes, HR Connect/Staffnet pages, useful guides and details of teams who can support you, should these be required. If you’re not certain what support you might need, please get in touch with the [Staff Experience team](mailto:ggc.staffexperience@nhs.scot) who will be able to guide you.

1. **Action planning discussion and iMatter report**

In this guide, we’ll talk about the key points of the action planning process and, we’ll focus on the different ways you, as the line manager, can engage your team in the discussion and ensure their voice is heard at action planning and beyond. This will be through using a combination of the iMatter report available to you, and asking questions that go beyond the report.

**The Action Planning discussion**

Below are some general points which are useful to remember in *any* iMatter action planning discussion, and can be adapted during team discussions throughout the year to better understand how actions are supporting change, or how experiences change throughout the year.

Remember – use the ways in which your team meet already to enable discussion and engagement. This might be in person, it might be hybrid or it might be fully online – think about what works best for your team.

And, if you’re not able to get the full team together at once, you can break this down and have a number of smaller meetings, and pull together the themes from each. Just remember to communicate with the whole team, perhaps using email or MS Teams, to outline the outcomes and proposed actions.

* Ask the team to share what a good experience feels like to them at work. You may want to encourage team members to write down their thoughts (e.g. using an online whiteboard or on paper). This will help you to understand what, together, the team feel is important in impacting their experience.
* Consider what has changed since they completed the iMatter questionnaire – has this changed their experience for better or are there different areas for improvement needed now.

\*\*It’s important to remember that many experiences of staff are impacted by themes which are not asked about in iMatter. Remember to make time in the discussion for those themes to be discussed, and it’s ok to have actions in your plan to reflect these – you don’t need to just stick to the themes in iMatter - remember, it’s about reflecting what’s important to you and your team\*\*

* It always important for the team to recognise strengths too. So based on your report and / or discussion, what should the team celebrate and continue to do?
* You may have a situation where one individual has concerns in relation to their own experience, which are different to the experiences of the wider team. In those cases, agree to discuss this via 121 discussions with the individual, outwith team action planning
* Responsibility for progressing the actions identified can shared amongst the team. This may be via whole team actions, or it may be that an individual takes on a specific action as part of their development, which you can discuss further via their Personal Development Plan and Review (PDP&R) discussion.
* Once the improvement opportunities are identified, the team prioritises no more than three on which to focus. See the [iMatter Action Planning Guide](https://www.nhsggc.scot/staff-recruitment/hrconnect/imatter/) for more information on adding this to the system.
* **!!Remember**: you can’t change *everything*, so focus on what you can influence as a team. Wider, organisational concerns should be fed upwards to your own line manager, or fed back to the Staff Experience team via this [link](https://forms.office.com/e/VCwyJx4hYp). These themes will be taken into consideration at a local Directorate/HSCP/service level, or Board level – wherever is most appropriate.

**The iMatter Report**

Within the iMatter report, the Employee Engagement Index (EEI) score is a score which helps identify the level of engagement of the team, against the themes measured in the questionnaire.

The EEI is generated from 28 questions relating to staff engagement, and gives a score out of 100. These are then grouped and colour coded as below:

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

Depending on your team’s EEI score, there might be different approaches you want to take in discussing the report, your teams experience and identifying the improvements you want to take forward together. The next sections provide key points to consider, depending on the EEI score, and type of report generated.

**2.1 Green Report**

Achieving a green report is a reason to celebrate in itself, and reflect on what the strengths are in your team, what is working well and look towards the coming year. As a team you should also agree at least one action to take forward in the coming year.

In this case, the team may feel that there are not many actions for improvement, therefore your action plan may be more reflective of your team strengths and positives, considering why they are strengths and how you aim to continue striving to maintain those throughout the year.

You might want to share any best practice with others (see [Success Register](https://scottish.sharepoint.com/sites/GGC-Staffnet/SitePages/Success-Register(1).aspx) and [Staff Experience Success Stories](https://www.nhsggc.scot/staff-recruitment/hrconnect/imatter/staff-experience-success-stories/)).

When considering improvements, it is always tempting as a manager to focus on the lower scoring areas, remembering that these might not be the areas that are most important to your team. In your discussions, it is good to ask “what is important to you?” - that will do the most to raise the overall experience score for your team.

**2.2 Yellow Report**

Most teams with a yellow EEI should still be able to work through the discussion / action planning process on their own. Achieving a yellow report is still a reason to celebrate and you should identify what aspects the team wants to celebrate/what has worked well in the past year

With a yellow report, there may be a trend to areas that score lower in the iMatter report – so a number of questions have impacted the score. Check these out before the discussion and raise them there – perhaps there has been a change / activity in the team or service recently which might have impacted experience?

While it is always tempting as a manager to focus on the lower scoring areas, remembering that these might not be the areas that are most important to your team. In your discussions, it is good to ask “what is important to you?” - that will do the most to raise the overall experience score for your team.

**2.3 Amber Report**

Additional focused support is likely to be needed in this instance, as the team may need to break down actions to help focus on what they feel is most important. As with a yellow report, it’s worth considering any recent changes / activity which might have impacted their experience.

If your team achieved an Amber report, the team should still focus first on what is good/what is working well, but also focus on what larger, perhaps more complex improvements are needed and what could be done to achieve these – does the team need support from their senior team or other teams to try and improve staff experience in the coming year?

With an amber report you are likely to have more than one action to take forward in the coming year. If you require some assistance in taking forward the action plan meeting with your team to discuss an Amber report, you can contact your local Senior OD Adviser or check out the *Further Support and Guidance* at the end of this guide.

**2.4 Red Report**

In this instance, it’s likely there are a number of factors which are affecting your teams experience at work. As the team manager, it’s worth reflecting on discussions at recent team meetings or feedback from staff in 121s, which might point to themes which are impacting experience.

Again, there may be a mix of larger, complex concerns, a number of smaller concerns, or concerns outside of iMatter which should also be considered in the discussion.

Then, if you feel comfortable, bring the team together to discuss the report, and what is impacting their experience. It’s important to allow staff to share in a safe space, and ensure everyone has the opportunity to speak, should they want to.

If you don’t feel you can take the meeting forward and would like support, you can contact your local Senior OD Adviser. There are also a number of development options available to guide you through more difficult discussions (see *Further Support and Guidance* at the end of this guide).

**2.5 No report**

No report is generated when a team does not achieve the response rate required (100% for teams of less than 5 staff). In this case, your team won’t generate a report or an EEI score. However, it’s important that you still have a conversation to identify themes to celebrate and improvement opportunities to progress.

You will have access to the overall Directorate or HSCP report which you will be able to use to begin the conversation. Look at whether the results there reflect the experience of the team, or are other themes which are more important to your team.

Similar to Red reports, if you don’t feel you can take the meeting forward and would like support, you can contact your local Senior OD Adviser. There are also a number of development options available to guide you through more difficult discussions (see *Further Support and Guidance* at the end of this guide).

1. **Ongoing engagement and discussion**

To ensure ongoing team engagement, it’s important to keep connecting with your team and understanding their experiences throughout the year – not just when completing the action plan. So, you should consider the following points:

* Set regular team meetings throughout the year, during which you should allow time to monitor well-being, workload, and experience.
* Consider how well the actions you previously agreed are progressing:
  + Have they been successful?
  + Has it made a difference
  + Does the team need support with taking any forward?
  + Is there anything from the previous action plan that could be built upon for the next one?
* Ask open-ended questions: Encourage sharing by asking questions such as:
  + What’s working well for you right now?
  + What challenges are you experiencing just now?
* Focus on listening: take a person-centred approach, to acknowledge the feedback and consider next steps
* Regularly update the team on what actions are being taken based on their feedback. Even small improvements reinforce that their input drives change.
* Demonstrate openness by sharing your own challenges, learnings, and updates.
* Promote psychological safety by reassuring your team that their thoughts, ideas, and concerns are valued.

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

1. **Further Support and Guidance**

**Helpful Guides**

[iMatter guides](https://www.nhsggc.scot/staff-recruitment/hrconnect/imatter/)

[People Management Guide - NHSGGC](https://www.nhsggc.scot/staff-recruitment/hrconnect/organisational-development-od-and-your-od-team/people-management-guide/)

**HR Connect /Staffnet Pages**

[Staff Engagement](https://www.nhsggc.scot/staff-recruitment/hrconnect/staff-experience/staff-engagement-2/)

[Management Development](https://www.nhsggc.scot/staff-recruitment/hrconnect/learning-education-and-training/management-development/looking-for-support-with-your-people-management-responsibilities/)

[Learning, Development and Training](https://www.nhsggc.scot/staff-recruitment/hrconnect/learning-education-and-training/learning-education-and-training-catalogue/) team

[Organisational Development](https://www.nhsggc.scot/staff-recruitment/hrconnect/organisational-development-od-and-your-od-team/) team

[Civility Saves Lives](https://scottish.sharepoint.com/sites/GGC-HR/SitePages/GGC-CSL-New-Homepage-October-2024.aspx)

[Staff Experience Team](https://www.nhsggc.scot/staff-recruitment/hrconnect/staff-experience/)

[Collaborative Conversations](https://www.nhsggc.scot/staff-recruitment/hrconnect/staff-experience/staff-engagement/nhsggc-armed-forces/)

[Investors in People](https://www.nhsggc.scot/staff-recruitment/hrconnect/investors-in-people/)

**Useful training and development opportunities**

[Essential Skills for Managers (an Introduction) - NHSGGC](https://www.nhsggc.scot/staff-recruitment/hrconnect/learning-education-and-training/learning-education-and-training-catalogue/essential-skills-for-managers/)

[People Management Programme](https://www.nhsggc.scot/staff-recruitment/hrconnect/learning-education-and-training/management-development/looking-for-support-with-your-people-management-responsibilities/)