 

 Action Planning Guide

 NHS Greater Glasgow and Clyde

 2025 Version

**Introduction**

Well done on encouraging your team to participate in the iMatter process.

This guide is intended to help you with the next stage of the process – discussing the results with your team and agreeing an Action Plan for the coming year.

**Contents**

1. Viewing Reports 3
2. Feeding back to the team / agreeing the Action Plan 5
3. Storyboard 8
4. Progress Update 10
5. Repeating the process next year 11
6. Further helps and Assistance 11

## Viewing Reports

Two weeks after the questionnaire is closed, reports will become available (or the next day if your full Directorate/HSCP is responding electronically – check [HR Connect](https://www.nhsggc.scot/staff-recruitment/hrconnect/imatter/) for details).

Managers will receive an email from Webropol notifying them that reports are available. Additionally, staff, with email addresses or mobile numbers entered on the system, will be sent a link to their own team’s report.

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

The following Reports will be published:

* Team Report
* Aggregated Directorate/HSCP Report
* A yearly EEI and Response Rates Report
* A Yearly Components Report
* A Sub-directorate Report for service/function leads (please contact the NHSGGC iMatter mailbox at ggc.nhsggc.imatter@nhs.scot if you would benefit from this level of report, and do not have access to this in the iMatter system)

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

**To view Reports –**

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



Alternatively you can see the reports by clicking on ‘Select Questionnaire’, click on your team, and then on the ‘View Results’ tab



By clicking on the report links from your home page dashboard, or selecting the ‘View Results tab’, you will be directed to the reports page.

You will see tabs for all the reports that are available to you.

You can also download reports to PDF by clicking on the PDF icon, this will bring the report up on your screen and you can print it off or save it to a file, so you can share a copy with your team.

However, staff with an email address or number in the system will also be sent a link directly from Webropol to the team report.

You will need to share copies with staff who completed via paper copy (i.e. do not have an email or number in the system.



**Your Team Report will show the following:**

* Your Team Response Rate
* Your Team Employee Engagement Index (EEI) score - the colour of the EEI score is reflected in the thresholds key below each chart
* The report will also show the NHSScotland Staff Governance Standard Strands which underpin the iMatter Continuous Improvement Model

**You will also see 3 sections in your Report relating to staff experience**:

* As an individual
* Within the team
* Within the organisation

You will see the average score for each question within each of the three sections at the end of each line.

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

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



## Feeding back to the team / agreeing an Action Plan

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

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

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

**Preparing to feedback**

* Read through the report yourself beforehand to get your own thoughts on what it is telling you
* Agree a time to meet with the team to discuss. Ideally, use time you already have arranged for a team meeting/discussion. Don’t worry if you cannot get everyone together at the same time. You can ask staff who cannot attend to let you have any thoughts / ideas they may have to allow you to include them in the discussions
* At the action planning discussion, you and your team will identify strengths to celebrate and up to three improvement actions to progress over the next 12 months. Please refer to the [Team Engagement Guide on HR Connect](https://www.nhsggc.scot/staff-recruitment/hrconnect/imatter/) for more information about taking forward the discussion with your team.
* Print a blank action plan template from your iMatter account under the help icon in the top right of the screen, or from [HR Connect](https://www.nhsggc.scot/staff-recruitment/hrconnect/imatter/). This is useful to allow you to complete and agree actions with the team and then transfer to your iMatter account later.

**Recording on your iMatter account**

* Now that you have jointly agreed an action plan you can transfer the information to your iMatter account
* You can access the Action Plan page directly from your home page dashboard by clicking on the Action Plan icon



* Alternatively you can access your action plan by selecting the questionnaire, click on your team and clicking on the Action Plan tab



Add the details from the agreed action plan and regularly click ‘save and continue’ to edit and make changes.

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

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

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

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

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



## Storyboard

As soon as you click ‘Complete Action Plan and Create Storyboard’, the Storyboard will be automatically generated.

You can access the storyboard directly from your home page dashboard by clicking on the Storyboard icon.



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



* The storyboard contains a summary of the outcomes and actions which were added to the Action Plan.
* It also shows your Team EEI score and the average score from the ‘Overall Experience’ question.
* A PDF of the storyboard can be downloaded and printed.
* Staff, with an email address or mobile number entered on the system, will be sent a copy of the Storyboard automatically, however you should ensure those staff with no email access or phone number in the system have access to a hard copy.



1. Progress Update

It is important that you and your team stay focused on achieving the agreed actions.

These should be discussed and updated regularly e.g. quarterly or regularly at team meetings.

Progress against each action can be entered onto iMatter Action Plan in the Progress Update section. This should include the results of the action taken and the date the progress was completed.



You can update this throughout the year and save using the save changes button. Once fully completed, Team managers should click ‘Complete and Lock’.

1. **Repeating the process next year**

As part of your continuous improvement journey the iMatter process will be repeated the following year.

You will be asked to confirm your team details again and will be able to make any changes required before the questionnaire goes out.

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

##  Further Help and Assistance

## Further guides, templates and information can be found on [HR Connect](https://www.nhsggc.scot/staff-recruitment/hrconnect/imatter/).

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