ACTION PLANNING GUIDE

Using this guide

This guide is for human resources (HR) practitioners and people managers who want to interpret and act on People Matter Employee Survey (PMES) results. The contents of the guide can be adapted to the way your agency or team communicates, makes decisions, and acts on findings. Review the guide and use what is most relevant to you and your employees.

Why is action planning important?

Action planning is important because employees judge the value of the PMES based on what you do with the results. Research indicates that employees who witness positive change from employee survey results are twice as likely to be highly engaged compare to those who do not.

The action planning process

Leading practice for responding to survey results is to follow the 30/60/90-day strategy. People managers should:

- receive access to survey results about 30 days after the close of the survey
- **review** the results and **develop** action plans within 60 days of survey close
- begin **implementing** action within 90 days of survey close.

Here are some activities you might engage in at each stage:

Timing: within 30 days after survey **Step:** Communicate results	• thank employees for participation • create awareness that the action planning process will begin soon • set expectations, accountabilities, and timeline
Timing: 30–60 days after survey **Step:** Review results and develop action plans	• review survey and results individually • meet with your team to debrief • select key priorities for improvement • develop action plans • share action plans with employees and leaders
Timing: 60–90 after survey **Step:** Implement actions	• establish ownership and timeline for actions • track progress against actions and communicate updates to employees • evaluate success of actions

Reviewing results

Before you review the results make sure you are familiar with the survey questions (Attachment A) and survey topics (Attachment B). Additionally, attachment B includes links to help improve scores for some topics. HR can add in agency-specific resources to Attachment B where relevant. Your PDF results report will also help you with understanding the survey and what it measures.

Here are some tips for reading and using your PDF results report:

- Start with *Headline results for key topics* (pages 5 and 6). These pages flag the top 3 and bottom 3 topics—areas of strength and opportunity.
- After you have scanned the Headline results you can look more closely at the scores for each question which are set out in the reports by topic area.
- Some key questions you can ask when looking at your results include:
  - How do your results differ from the sector's, cluster's, parent unit's, etc.?
  - What are the highest scoring topics and questions?
  - What are the lowest scoring topics and questions?
  - How have results changed from last year?
- If your team has 50 or more respondents, you can also look at child unit differences and differences between demographic groups.

When reviewing the results, think about what can be done to address areas of opportunity, so you can go into team meetings armed with knowledge.

What size difference is big enough to be important?

We typically advise that a difference of +/- 5 is worthy of attention when, for example, comparing this year's PMES scores to last year's. However, what constitutes an important difference depends partly on the size of the team you're looking at.

PMES scores can change from year to year due to:

- real change in the workplace, for better or worse—the biggest cause of change in scores
- random fluctuation, a data phenomenon—a much smaller cause of change in scores.

The PMES is a robust questionnaire, but it isn't perfect. If the same group of employees took the survey twice in a row, we would expect the average scores on the second time to be slightly different from the average scores the first time just by chance. This is random fluctuation. The larger the group of employees, though, the smaller and smaller this day-to-day random fluctuation becomes.

What this means for interpreting results is that:

- a difference +/- 5 percentage points works most of the time for judging differences
- in small organisational teams, some differences greater than 5 may be due to random fluctuation rather than real change, so may not be all that important
- in large organisational teams, some differences smaller than 5 may be due to real change rather than random fluctuation, so may be important.

Debriefing with your team

The 60-day window for review and planning sets the expectation that managers review and then discuss results with their teams to develop an action plan or plans. You may want to do have a single session to both review the results and action plan, or two separate sessions a week apart to give people time to digest the results.

Preparing for the session

You will need to identify who will facilitate the session. Typically, the team manager is best suited to facilitate the session. However, if there are concerns about the willingness of staff to discuss issues with the manager it might be worth considering an independent facilitator (like an internal HR business partner). Once you've decided, you can book in 1–2 hours in employees' diaries. If you decide to include the action planning component, you will need 2 hours. The conversation guide included as Attachment C can help you structure your session.

During the session

Make sure you communicate the purpose of the session: to communicate and explore the feedback given by staff in the PMES. Also, provide a refresh about the survey itself (e.g. when it was conducted, who did it, the anonymous nature of the survey). You can find out more information about the survey, including privacy rules, on the survey's FAQ page.

Highlight the overall organisation results (response rate, key strengths, action areas) and then review your team's results as a group.

After the session

After the session, circulate a summary of the discussion to the team, and information about action planning (if this is to be a separate session). Also consider if you need to communicate to HR or senior managers about the outcomes of the session.

Creating an action plan

We recommend limiting the areas for improvement for each work area to three. Focusing change efforts on a few areas will have a flow-on effect to other areas as well.

Prioritising issues

It is good practice to agree on criteria for prioritising issues. The criteria could include:

- alignment with organisation purpose and values, and any organisational-level action plans
- degree of risk if the issue is not addressed (e.g. high rates of bullying, or other topics with high unfavourable scores)
- capacity to act on the issue (e.g. budget and resources)
- a mix of quick wins (e.g. topics with high neutral scores that can be shifted to favourable easily) and longer-term improvements
- the mix of priorities.

Setting goals and outcomes

The next step after identifying priority areas is to develop the action plan which is aligned to the priority areas. Develop the action plan with action steps, ownership, and timelines. Importantly, remember to develop SMART action plans:

> *SPECIFIC, MEASURABLE, ACHIEVABLE, RELEVANT AND TIME-BOUND*

- **S**pecific: Can you define the steps to reach the goal?
- **M**easurable: How will you show improvement?
- **A**chievable: Is this something you have control over?
- **R**elevant: Does it relate to the issue at hand?
- **T**ime-bound: What is your time limit?

If your action plan does not address each of these criteria, then it is less likely to deliver your intended results. Don't forget to regularly review your plan to determine progress and if you need to make any changes. Consider using the template we've provided as is or adapt it to your needs (Attachment D).

Updating employees on progress

Often organisations can implement many changes after the survey, but these are not recognised in the follow up survey results. Make sure staff are aware of any actions that have resulted from the survey.

Take advantage of multiple communication channels (e.g. email, newsletter, meetings, intranet, forums, bulletin boards) and explicitly link actions and outcomes to survey findings.

Share your success stories

We would love to hear about your PMES success stories and what your agency is doing to understand and implement your PMES results. Please email the PMES team at the Public Service Commission at employeesurvey@psc.nsw.gov.au.

Attachments

Attachment A	People Matter Employee Survey 2020 questionnaire
Attachment B	PMES topic definitions and resources
Attachment C	PMES debriefing conversation guide
Attachment D	PMES action plan template