

PMES Action Planning Guide 2023

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?

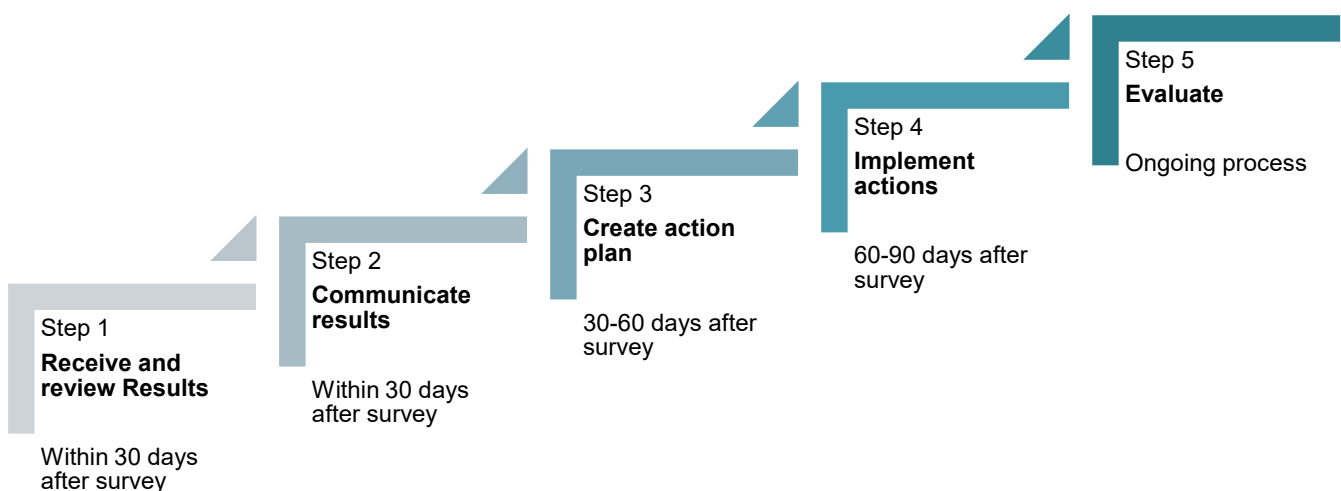
Action planning is important because employees judge the value of the PMES based on what you do with the results. Research indicates that employees who witness positive change from employee survey results are twice as likely to be highly engaged compared to those who do not.

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 is a timeline to guide you through each stage:



Step 1 - Review results

Lead	PMES lead or HR practitioner/people manager responsible for PMES in the agency
Timeframe	Within 30 days after the survey
Supporting documents	Attachment A – PMES 2023 questionnaire Attachment B – Topic definitions and resources

Make sure you are familiar with the survey questions (Attachment A) and survey topics (Attachment B). Attachment B includes links to help improve results for some topics. HR can add agency-specific resources to Attachment B as appropriate.

Your PDF results report will also help you with understanding the survey and what it measures. When reading and interpreting your PDF results report, it is important to consider the **following key questions**:

- How do your results differ from the results in your sector, portfolio, parent unit, etc.?
- What are the highest scoring topics and questions?
- What are the lowest scoring topics and questions?
- How have results changed from last year?
- How have topic group and key question results changed over the past three years?

This allows you to think about what can be done to maintain strengths and address priority areas so that you can go into team meetings informed with knowledge.

Tips for reading and using your PDF results report:

- Start with '**High level results**'- Refer to '**Headline results for key topics**' for a snapshot of results and the 3 highest and lowest scoring topics. You can also find out more about the highest and lowest scoring questions, most and least improved questions and key drivers of engagement in this section.
- After you have scanned the high-level results, you can look more closely at the results for each question which are set out in the reports by topic area (see '**Results by topic**').
- If your team has 50 or more respondents, you can also look at child unit differences and differences between demographic groups (see '**Results by child unit and demographic group**').

Supporting information

What size difference in results is big enough to be important?

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

What are some common reasons for changes in PMES results year to year?

- real changes in the workplace, for better or worse, may result in large changes in results
- random fluctuation, a data phenomenon, may result in a smaller change in results.

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 results the second time to be slightly different from the average results the first time, just by chance. This is random fluctuation. The larger the group of employees, the smaller this day-to-day random fluctuation becomes.

What do these changes mean when interpreting results?

- a change of +/- 5 percentage points is usually effective for evaluating differences
- in small organisational teams, some differences greater than 5 percentage points 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 percentage points may be due to real change rather than random fluctuation, so may be important.

Step 2 – Communicate results

Lead	PMES lead or HR practitioner/people manager responsible for PMES in the agency
Timeframe	Within 30 days after the survey
Supporting Documents	Attachment C – Debriefing and action planning conversation guide

Employee engagement is about a person's connection to their organisation. It is a global measure of employee experience. You can influence employee engagement in your team by having a conversation about your recent PMES results. Your team can refer to a work team, branch, division, or the whole organisation.

The main objective in communicating results to the agency/team is to thank employees for their participation, create awareness that the action planning process will begin soon and to set expectations, accountabilities, and a timeline.

Consider forming a working group to work through issues identified and develop an action plan.

How you communicate results and set up your PMES working group will depend on several factors.

Consider: agency size; whether there are differences in agency results vs team results; and likely key action areas.

Preparing for the session

Prior to debriefing the agency/team, you will need to identify who will facilitate the session (typically, the team manager or PMES lead). If there are concerns about the willingness of employees to discuss

issues with the manager, it might be worth considering an independent facilitator (like an internal HR business partner).

During the session

1. communicate the purpose of the session – to explore and discuss the feedback given by employees in the PMES
2. provide a refresher about the survey itself (when it was conducted, who did it, the anonymous nature of the survey*)
3. highlight the overall organisation results (response rate, key strengths, and action areas)
4. seek volunteers to participate in your PMES action planning working group.

* More information about the survey, including privacy rules, can be found on the survey's FAQ page.

After the session

Circulate a summary of the discussion to the team and information about action planning. Also consider if you need to communicate to HR or senior managers about the outcomes of the session.

Supporting Information

What is a PMES action planning working group?

The purpose of the working group is to determine challenges and opportunities presented from the results of the survey and create an action plan to address them.

Taking a co-design approach to action planning which includes team members and managers is recommended. It provides a collaborative opportunity for employees to reflect on survey findings and participate in inclusive design solutions for the issues identified. This promotes employee involvement, fosters a sense of collective ownership, and boosts team morale.

At a team level action planning can involve all team members. At a division or agency level, consider forming an action planning working group. This working group should be made up of representatives from various teams, roles, and levels within the division/agency so it's representative of the overall division/agency. We recommend calling for interested individuals to volunteer for the role or to call on each area to nominate one or two individuals to represent them on the working group.

What is the role of individuals in the PMES working group?

To represent their team/division in developing and implementing an action plan. Individuals within the working group act as a voice for their team/division identifying their thoughts or insights on the PMES results and ideas to address key target areas.

Individuals within the working group are also responsible for implementing and monitoring the action plan within their own team/division (within the reasonable capabilities of their job role) and to report back results or observations to the working group.

Step 3 – Create action plan

Lead	PMES working group and PMES lead
Timeframe	Within 30-60 days after the survey
Supporting documents	Attachment C – Debriefing and action planning conversation guide Attachment D – Action plan template

Once you have established a working group(s) or in your team you should bring the group together to discuss the results and the challenges and opportunities using Attachment C as a conversation guide. Out of these discussions you should start to prioritise areas to address and develop an Action Plan using Attachment D.

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

In your working groups or teams

Prioritising issues

Select the 2–3 key issues to work on. Choose items that your team agrees on. Consider the priority of issues, the resources available to act on survey results, the time to see benefits, etc.

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

- alignment with organisation purpose and values, and any organisation-level action plans
- degree of risk if the issue is not addressed (e.g., high rates of bullying, or other topics with high unfavourable results)
- capacity to act on the issue (e.g., budget and resources)
- a mix of quick wins (e.g., topics with high neutral results 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. Remember to develop SMART action plans.

Ensure there are quick wins and medium-to-longer term strategies when developing the action plan. Quick win solutions are strategies that build on existing approaches and leverage existing resources. They typically don't require significant additional time, budget, or personnel to implement and can be implemented quickly to demonstrate that the agency is serious about acting on survey results. Medium-to-longer term solutions are wider ranging and typically require more extensive resources.

It is important to regularly review your plan (in your working groups or with relevant contacts for action steps) to determine progress and if you need to make any changes.

Consider using the template we have provided or adapt as appropriate to meet your needs. (Attachment D)

GOAL SETTING PRINCIPLES

Specific
Measurable
Achievable
Relevant
Time-bound

Step 4 – Implement action plan

Lead	PMES working group, PMES leads, relevant individuals who have been assigned action steps
Timeframe	Within 60-90 days after the survey

Once the action plan has been made, allocate action steps to employees who are best placed to monitor, carry out and evaluate the steps. This ensures that ownership of actions and timelines are established.

Employees allocated with action steps may be a part of the PMES working group/team, people managers, HR, or subject matter experts in your agency.

It is important that those allocated with action steps regularly track the progress of the action steps in their teams to report back to the PMES working group. This way any concerns or issues can be quickly identified and resolved.

It may be useful to set up regular meetings for the PMES working group to consolidate their observations to provide updates regarding the progress of the action plan to employees.

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 employees 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.

Step 5 – Evaluate

Lead	PMES working group, PMES leads, relevant individuals who have been assigned action steps
Timeframe	Ongoing process

This step is closely linked to step 4 above. The PMES action plan should be treated as a living document and regularly updated as each step is progressed or completed. The PMES working group should monitor the action plan to understand what works for different teams and what doesn't and adapt the action plan to reflect this feedback.

One way to gauge the success of your action plan is to conduct pulse surveys. Short surveys that measure the action areas you have chosen to focus on can give you an indication of whether the action items are impacting on and improving results for your organisation in these areas. You may also wish to include opportunities for open text feedback if you need further ideas/guidance on approaches to addressing these areas.

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.

The PMES collaboration group Teams channel is another avenue for sharing stories, having structured discussions, and sharing information with other PMES leads across the sector. Please email the PMES team for access to the Teams channel.