communication & action planning toolkit

using surveys to achieve organisational change
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credits
We have used a combination of our own and client-developed materials, and would like to thank all those clients who have contributed.
purpose of this toolkit

This toolkit is designed to help you communicate survey results and create action plans around the priority issues identified in your Voice survey (engagement or service quality). In the pages that follow, we will provide you with tips and resources for navigating the final three stages of the survey process so that you can leverage your results to improve performance.

why report survey feedback and plan actions?

Research undertaken by Voice Project and Macquarie University shows the importance of feedback and action planning. This research study included 298 organisations, in which 3079 employees took part, showed that those who feedback and act on survey results exhibit almost double the levels of engagement among employees (see the figure below). We cannot overemphasise that it’s what you do with the survey results that counts.
feedback and action planning
1. feedback results

It is important to feedback survey results as a sign of respect for staff and acknowledgement of their efforts to improve the organisation. It demonstrates a desire to involve staff in understanding and using the results.

planning feedback sessions

- **Scheduling** - feedback sessions should be scheduled as soon as possible after receiving results, and a maximum of 3 months from the close of the survey. Ideally, your feedback and action planning steps can be included in your survey timeline and your pre-survey communications to staff and management.

- **Cascading results** - Feedback is best cascaded in a top-down manner so that each level of management has time to comprehend the results and can facilitate feedback at the lower levels.

- **Session focus & length** - the focus of feedback sessions should be on understanding the results, identifying issues and possibly identifying gaps where further investigation is needed. This allows time for staff to understand, accept and digest results. If you plan to use the feedback sessions for problem-solving or action planning then you will need to schedule sufficient time to do so.

involve and equip managers

involve managers in communicating survey results

- Have the CEO present the overall survey results to employees in large ‘town hall’ meetings or a ‘road show’ to different organisation sites.

- Have senior management present at the feedback sessions to acknowledge and own the results.

- Get line managers to feedback results in small division team meetings

- Use HR or a Voice Project consultant if trust levels are low or when an independent person is likely to lead to a more constructive meeting (e.g. for work groups with low scores in Supervision or where there are bullying or inclusions issues).

**equip and support managers**

Most managers will need the support of HR/Voice Project to equip them for this task. We recommend working through the work group’s results with the manager to ensure he/she understands how to interpret the results, has the opportunity to ask questions, and has time to comprehend the issues. Additionally, it is best to help this manager select the data to be presented and collaboratively develop an agenda.
reporting results

Be constructive and positive when sharing results. Be sure to:

- Highlight and celebrate strengths.
- Thank employees - remember to thank staff for their participation in the survey process and recognise those who made contributions.
- Assure staff and managers that they will not be punished for poor results; however, they will be held accountable for taking action on issues that the survey raises.
- Share next steps - include information about decision-making and action planning processes, and the roles of managers and employees therein.

communication channels

Use multiple communication channels to reach the maximum number of staff. While face-to-face sessions tend to be the most effective method, other channels can help you to communicate the results more broadly to staff. Communication channels could include:

- Large group presentations
- Local work area discussions
- A written or video summary of the results on the intranet,
- All-staff email
- Online interactive presentations
- Newsletter or booklet.
2. understand issues

Dig deep for underlying root causes – solutions will only be effective if they are targeted at the real problem, not surface issues. Ask ‘why?’ this problem exists and continue asking ‘why’ this is so to derive a chain of explanations and build a depth of insight. For example, if there were significant negative responses to the statement, "My organisation is good at selecting the right people for the right jobs,” managers should explore with employees why they think that, and what gets in the way of making better decisions.

Some useful questions for understanding issues include:

- What are the group’s strengths and areas for improvement based on Percentage Favourable ratings? Look at both the broader survey areas (such as Purpose and Property in the Voice engagement survey) and individual practice areas.
- Where are the group’s results different to the organisation as a whole and/or industry benchmarks?
- If there has been some time between survey administration and reporting, have there been any changes in these areas since the survey was run?
- What conclusions can be drawn from the results in relation to the group’s core mission or strategic goals?

**explore different perspectives**

To better understand the issues arising from the survey, it is useful to consider the feedback from different organisational perspectives and to run sessions to gather more information.

- **Work group discussions** - Feedback sessions in small work groups provide the opportunity to understand results in context and in greater depth. Staff can explain any ambiguous results, provide specific examples of issues and help prioritise the most important issues to be resolved in their area.
- **Human Resources** - While line managers and teams can look at group results by department, HR managers need to examine the results for other groups of employees (e.g., by age group, critical roles or tenure), as there may be particular issues that can be tackled in a strategic and targeted way with these groups.
- **Focus groups** - if necessary, seek volunteers to gather further information around survey-identified issues before holding action planning meetings. These sessions target one specific area and are conducted in an open, safe and comfortable environment in which employees candidly discuss their experiences and perceptions of the workplace. Some focus groups may need to be independently facilitated as the issues are too sensitive for staff to discuss in front of managers.
• **Access other data** – to better understand the survey results it is useful to look at other information such as internal audits or client feedback. How does this additional data affect your understanding of the issues emerging from the staff survey? For example:

  **Client 1:** At one of our client organisations in the education sector, staff viewed their Industry Engagement as a significant strength and this was backed up by their leading position in an external survey with industry.

  **Client 2:** This client’s survey analysis showed that staff satisfaction with Technology was acceptable – staff’s experience of technology was largely problem-free and it was not significantly impacting on their ability to perform their jobs. However, the client had recently had an external IT review which had identified critical issues with their aging technology that would soon impact performance if not addressed. This example highlights that staff surveys can show current experience and it is important to be mindful of likely changes to the work environment.
3. prioritise issues

In order to focus efforts, we recommend organisations choose only 3 areas for improvement at each division level or work area. According to the Pareto Principle, 80% of an organisation’s problems stem from 20% of the causes. Focusing change efforts on a few areas will most likely have a flow-on effect to other areas as well.

**establish prioritisation criteria**

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

- Impact on passion (employee engagement) and organisational progress. Voice survey reports present a “priority matrix” to help identify priorities. Priority areas are those practices where current performance is low but the practice has a relatively high impact on passion (employee engagement) and organisational progress.
- Alignment with organisation purpose and values
- Degree of risk if the issue is not addressed - health and safety, legal or other risks
- Capacity to take action on the issue - are there any budget or resource considerations?
- The mix of priorities - some organisations choose to identify a strength to leverage as well as selecting areas for improvement.

**set organisational and local-level priorities**

Improvement action planning should combine both “top down” and “bottom up” processes. The priorities for the organisation can be identified, communicated and acted upon at the senior management level, then local units should tackle the things that they have direct control over and escalate anything else back upwards. These units should also have some scope to identify team-level priorities.
4. plan actions

action planning steps

There are four simple steps in action planning:

1. Clearly **define the problem** to be addressed. This should have already been started in the feedback sessions.
2. **Identify potential root causes** of the problem. Try to encourage staff to look at the problem from different perspectives such as resources, systems, processes, people, or environment.
3. **Generate and agree on possible solutions** to the problem. Use brainstorming or some other non-judgmental activity to generate as many ideas as possible. Then reach group consensus or use other decision-making processes to agree on solutions. This can be as simple as recording ideas on flip charts, and then giving each employee three stickers to "vote" for the ideas they feel will be of greatest benefit.
4. **Develop the action plan** steps and follow-up procedures. Be sure to implement some ‘quick wins’ for immediate impact, as well as planning for the longer term.

**tips for conducting an action planning meeting**

- Clearly communicate what’s in it for them
- Start action planning with a review or exploration of the mission, vision, values, guiding principles, higher-order goals, etc., in order to focus the action planning upon what’s most important to the individual or group.
- Plan to address only one or two issues, or break into smaller groups to focus on one issue each.
- Action plan the high-priority items first.
- Focus on issues as they relate to the group so they are directly actionable by the staff in the room (what can we do, rather than what we want management to do). However, make recommendations for action even if the issue is beyond the group’s direct control. These can be passed on appropriately and they may even identify ways the issue can be partially addressed at a local level.
- Record discussion and decisions and keep with any formal survey action plans; they can then be communicated to senior managers and the CEO. Use a simple template for designing and documenting a good action plan (see the Voice Action Planner in part two).
- Have a variety of methods for people to bring forward ideas – some less threatening than others. For example, using post-it notes or discussing ideas in pairs or small groups first.
- Clarify administrative procedures for tracking implementation and progress.
5. implement and monitor

It is important that Human Resource staff are perceived as facilitators not ‘owners’ of the change process. Senior management must set a sincere expectation that plans will be developed, implemented and reported. They can hold managers and teams accountable for planning and taking actions as well as supply the authority and resources they need.

methods for implementing & monitoring actions

<table>
<thead>
<tr>
<th>method</th>
<th>description</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPIs</td>
<td>Set individual and manager KPIs that relate to actions emerging from the survey. These can be reviewed regularly and link to reward and recognition systems</td>
</tr>
<tr>
<td>individual responsibility</td>
<td>Responsibility for ensuring the change takes place must rest with an individual staff member (not the team as a whole as there is a tendency to assume that the task ‘has been done’).</td>
</tr>
<tr>
<td>senior management monitoring</td>
<td>People with responsibility for achieving goals should be required to regularly review progress and report back to a more senior manager.</td>
</tr>
<tr>
<td>share plans on intranet</td>
<td>Consider posting all action plans developed for addressing issues raised in the survey process onto a public website. This provides incentives and accountability for action, as well as serving as communication tool to view other plans to spark ideas across the organisation.</td>
</tr>
<tr>
<td>set change targets</td>
<td>The Voice Action Planner (see part two) helps managers set targets and measure improvement in subsequent staff surveys or other relevant performance indicators.</td>
</tr>
</tbody>
</table>
| measure change                  | Monitor and evaluate strategies through small ‘pulse’ surveys. These can be run around just a few target issues to measure progress between larger scale surveys. Adjustments to initiatives can be made according to feedback. You can also add Voice Project’s “Voice Impact” items:  
  * I have received feedback about the results of my suggestions;  
  * My suggestions are acted upon. |
6. communicate actions

Often organisations can implement many changes after the survey but these are not recognised in the follow up survey results. Unless staff are aware of actions that have resulted from the survey they perceive it to be ineffective. Regular communications linking change and improvements (small and large) to the survey initiative will enhance the credibility of and commitment to the survey process. Take advantage of the multiple communication channels at your disposal (e.g. email, newsletter, meetings, intranet, forums, bulletin boards, etc.) and say “Remember this is what you said in the survey, and this is the action we have taken as a result.”

Some useful ways to communicate action include:

- Add a “Survey Update” column to your employee newsletter. The column’s consistent theme should be “Here’s what you said, here’s what we did.”
- Add a set item in every supervisor’s staff meeting agenda to discuss updates to the Voice Action Planner. By involving and continually communicating information to the employees, it will help ensure that the action plans that management established are meaningful, accountable and successful.
- At senior reporting meetings, ask senior leaders to share their thoughts on staff actions that have been particularly effective and then publicise these actions to all teams. Encourage teams to consider these successes and adapt them, if needed, to create similar results in their own teams.
- Tailor your messages to the different audiences (e.g., leadership team, managers and staff).
- Ensure your leadership team reinforce consistent messages about the actions that will be taken as a result of the feedback.
- Develop a communication plan.
templates and tools
templates and tools

This section provides templates and tools for communicating survey feedback and creating action plans. We strongly recommend tailoring them to best suit your organisation.

These templates and tools cover:

**communicating survey feedback**
- Results communication template
- Example rollout schedule
- Guidelines for running a business unit feedback session

**action planning**
- Voice action planner - template 1
- Action planning template 2
- Action plan – Example 1
- Action plan – Example 2

**communicating progress**
In July of this year, XYZ Organisation undertook an Employee Opinion Survey to give you, our employees, a voice in determining the future direction of XYZ Organisation. I would like to say thank you to those [# of respondents] who participated in the survey. This represents XX% of our employees wanting to make a positive contribution to XYZ Organisation’s future. Our consultants at Voice Project from considered this response to be a commendable effort. Your feedback and continued support is important to us and the responses you provided will assist us all to improve our systems and the way we work.

Please take a few minutes to look through the survey results, and again, thank you for your participation.

There were 32 different management and human resource practices scored in the survey. There were some pleasing and some not-so-pleasing performances in how we scored ourselves, however, I want to stress that all of this feedback is appreciated.

Our top three performing management practices, and the percentage of employees who rated them favourably, were:

1. XXXXXXXXXXXXXXXXXX (88%),
2. XXXXXXXXXXXXX (82%), and
3. XXXXXXXXXXXXXXXXXXX (77%).

You also told us we could continue to improve in the following key areas:

1. XXXXXXXXXXXXXXXXXX (16%),
2. XXXXXXXXXXXXXXXXXXXXX (19%), and
3. XXXXXXXXXXXXXXXXXXX (24%)

[Description here of what are the next steps (e.g., action planning)]
Highest Scoring Questions

The top questions from the survey, with the percentage of employees who rated them favourably were:

- [question] (91%)
- XXXXXXXXXXXXX (89%)
- XXXXXXXXXXXXXXXX (88%)
- XXXXXXXXXXXXXXXXXXXXXX (88%)
- XXXXXXXXXXXXXXXXXXXXXXXXXX (88%)

Your Comments

Thank you for giving us your opinions, advice, and ideas from the open ended questions.

Here are some of the themes and your comments from the question “List the three greatest strengths of XYZ”.

- Theme A
  [Quote(s) and/or paraphrasing of a couple responses].

- Theme B
  “... etc.”

- Theme C
  “... etc.”
Lowest Scoring Questions

The lowest scoring questions from the survey, with the percentage of employees who rated them favourably were:

- [question] (13%)
- XXXXXXXX (14%)
- XXXXXXXX (17%)
- XXXXXXXX (17%)
- XXXXXXXX (18%)

Your Comments

Again your feedback from the open ended questions was much appreciated.

When you were asked to "List three ways XYZ could be improved" your comments included:

- Theme A
  [Quote(s) and/or paraphrasing of a couple responses].

- Theme B
  "... etc."

- Theme C
  "... etc."

Where can I find further information?

More detailed results are currently being communicated to Division and Business Managers throughout XYZ and can be accessed by [source of information].

For all further information about the survey and results please contact [person] on [contact details].
## Example Rollout Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22 August XXXX</td>
<td>Climate survey results received from the consultant</td>
</tr>
<tr>
<td>2 September XXXX</td>
<td>Consultant from Voice Project presents to the Division of Human Resources about results pertaining to their areas of responsibility. Division begins to consider how to respond in planning for XXXX.</td>
</tr>
<tr>
<td>22 September XXXX</td>
<td>VP consultant presents to Senior Executive Group (SEG) The SEG commences development of communication plan and response plan.</td>
</tr>
<tr>
<td>Week Commencing 13 October XXXX</td>
<td>Memo to go to Senior Management – Deans, Executive Directors, Directors, Heads of School – with a copy of the report advising that:</td>
</tr>
<tr>
<td></td>
<td>a) A report will be placed on What’s New &amp; News with a web link to Organisational Development – Reports and Publications.</td>
</tr>
<tr>
<td></td>
<td>b) A meeting will be organised with their Senior Management to look at the more detailed analysis of the area and consider issues that need to be addressed and how.</td>
</tr>
<tr>
<td></td>
<td>c) Director, Organisational Development to ensure that the SEG have received information related to their reporting areas, e.g., DVC (Academic) – Faculties/Schools etc.</td>
</tr>
<tr>
<td>Week Commencing 20 October</td>
<td>What’s New &amp; News message and report on web.</td>
</tr>
<tr>
<td>Week Commencing 20 October</td>
<td>Director, Organisational Development to liaise with individual SEG members to discuss how to respond to particular areas of the report – meetings with Heads of School etc.</td>
</tr>
</tbody>
</table>
guidelines for running a business unit feedback session

preparing the session

1. The business unit manager should review all the survey results documents. These may include:
   • Overall results – from the organisation as a whole and/or the broader function that this business unit belongs to. What are the key strengths and development areas?
   • Business unit quantitative results (the report with the traffic light colours).
     • Where are these results the same or different to the overall themes?
     • What are the strongest rated categories and questions?
     • What are the lowest rated categories and questions?
   • Interpretation guidelines – these provide an explanation for the different numbers and statistics used in the quantitative results.
   • Business unit text responses - identify some comments which may help illustrate the overall results.

2. Identify who will facilitate the session. Typically, the business unit manager is best-suited to facilitate the session. However, an independent facilitator (e.g., HR or a consultant) can be useful if there are concerns about the willingness of staff to directly discuss issues with the manager.

3. Book the session. Typically, 1-2 hours is needed for the results to be explored and clearly understood.

4. Prepare materials needed for session
   • Projector (optional)
   • Copies of business unit reports – quantitative and open-ended responses. If the open-ended response report is lengthy (4 or more pages), it is often useful to send this out before the session to all staff members as pre-reading.

during the session

1. Purpose:
   • Communicate the purpose of the session (e.g., to communicate and explore the feedback given by staff in the recent employee survey).
   • Ask if anyone has any other expectations of the session.

2. Session parameters:
   • Time available.
   • The focus is on exploring issues without judgment and not discussing specific individuals.

3. Communicate quantitative results:
   • Refresh staff about the survey itself (e.g., when it was conducted, who was invited to complete it, anonymous nature of survey and the minimum number of people needed before a business unit report was generated).
   • Highlight the overall organisation results (response rate, key strengths, likely action areas).
   • Review the business unit quantitative results as a group (either with handouts or projector).
• Start at the high-level results (passion, progress and performance overview) & explain how the traffic light colours work (using the interpretation guidelines as a reference).
• Depending on the size of your team, your report may show a priority matrix which suggests potential priorities for improvement.
• Following this, more detailed question-level feedback is presented

4. Explore results – the following questions can be used at any point to facilitate the group in reviewing the information:
   • What are the strengths of the business unit? What is being done well in this business unit which makes XX a strength? How can this team/business unit maintain or improve on this strength?
   • What are the weaker areas for the business unit? Why has area YYY been identified as a weakness for our business unit? What has to change before YYY can become a strength?
   • How similar are the business unit results to the overall results?
   • Which areas does the team feel are the most important to focus on?
   • Which areas appear as priorities according to the priority matrix?

5. Communicate Open-Ended Results
   • Highlight the key themes from the organisation as a whole.
   • Review business unit feedback.
     • If the report is 3 pages or under, provide enough time for staff to read responses.
     • For longer reports, seek feedback on themes identified in pre-reading for session.
   • Questions to consider
     • How similar are the business unit results to the overall results?
     • To what extent do the comments fit with the quantitative feedback?

6. Confirm next steps
   • What are the 2-3 priorities that need to be addressed?
   • When & how will action planning occur for these issues?

7. Thank staff for their contributions to the survey and the discussion.

after the session

1. Circulate to the team a summary of the discussion.
2. Confirm how action planning will occur on the identified issues.
3. Is there a need to communicate to HR or senior managers about the outcomes of this session?
### Action Planning

**Voice Action Planner – Template 1**

<table>
<thead>
<tr>
<th>Priority Area</th>
<th>Definition of problem at workgroup level</th>
<th>Implementation Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.g., Career Opportunities</td>
<td>Some staff believe that there is a lack of career opportunities and effort spent on career development.</td>
<td>1. Incorporate career planning into the performance review cycle 2. Put into place processes to ensure that all jobs are advertised internally first before looking for external applicants 3. Restructure organisation into a smaller number of divisions to improve the growth of the organisation. This will also enhance job awareness of job opportunities across the organisation.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>When</th>
<th>Who accountable</th>
<th>Support needed</th>
<th>Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specifc and realistic</td>
<td></td>
<td></td>
<td>1. Incorporate career planning into the performance review cycle 2. Put into place processes to ensure that all jobs are advertised internally first before looking for external applicants 3. Restructure organisation into a smaller number of divisions to improve the growth of the organisation. This will also enhance job awareness of job opportunities across the organisation.</td>
</tr>
</tbody>
</table>
action planning template 2

Voice Project’s standard engagement survey reports include a simplified action planning template, as shown below.

<table>
<thead>
<tr>
<th>goal</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>(what do you want to achieve?)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>tasks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(how will you get there?)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>deadline</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(by when?)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>monitoring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(how will you track progress?)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
action plan – example 1

(Organisation C’s) Plan for Change!

What changes do we plan to make?

In the survey you told us you were dissatisfied with communication across Organisation C while also being dissatisfied with leadership. We plan to improve these scores by following the attached plan.

How will we make changes?

The senior leaders and myself (Organisation C, CEO) plan to make changes that will directly improve things for each staff member, i.e., changes in your workplace. We will do this firstly by consulting with you on what you need and how you would like us to action changes and then by you taking action. With respect to communication, we will ask you, through local forums and workshops, what you want to know about it, how it’s best to tell you what you want to know and how often you want us to communicate. In regard to leadership, we will ask you if you have ideas on how myself and the senior leaders can spend more time communicating what you want to know about, how we can do this more effectively and how often you would like us to keep in touch. We also want to know how you would like to open communication channels with us. We value your contribution to this discussion and hope you are looking forward to this joint venture of improving our organisation.
<table>
<thead>
<tr>
<th>Organisation Level</th>
<th>Communication Plan</th>
<th>Action Plan</th>
</tr>
</thead>
</table>
| The Coal Face      | At team level, we will be asking managers to present the overall organisation results as well as results for each team. | All actions will be focused on the coal face. We will be asking managers to run their own focus groups to decide on:  
- What to work on (considering senior leader requests)  
- How to work on it  
- When to know it has been achieved |
| Team Managers      | In the weeks following dissemination of the survey results, HR will be sending out and helping team managers understand their reports | Team managers are expected to show team results to their staff and collaborate on actions as per the square above. Team managers are also required to report on progress on actions in March, June, September and December until the next survey is run. |
| Mid Managers       | In the weeks following dissemination of the survey results, HR will be sending out and helping mid managers understand their reports | Mid managers are expected to assist team managers in creating and taking action on their survey results. Mid managers are also required to compile team reports on actions for submission to senior managers and myself (CEO) |
| Senior Managers and CEO | As soon as the final results report is completed, Voice Project will present the results to the leaderships team | Senior leaders are expected to assist all other managers in ensuring that change is encouraged at the coal face. We have also made our own decision as to what we want to improve (communication and leadership) and we will be looking for managers down the chain to provide us with potential solutions and actions we can take. We will monitor actions plans and action results. We will also be asking managers to invite senior managers and myself into their areas to discuss action decision in an effort to gain further insight in what we can do.  
Seniors leaders will also be required to combine mid manager action plans into division action plans and to comment on progress at the end of the months of March, June, September and December (see example on the next page) |
### Example reporting format for team managers/mid-managers and senior managers

<table>
<thead>
<tr>
<th>Division</th>
<th>Area</th>
<th>Team</th>
<th>Issue from survey</th>
<th>Summary of discussion with staff</th>
<th>Actions to be taken</th>
<th>Individual taking responsibility for action</th>
<th>Progress report on action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations</td>
<td>Marketing &amp; Fundraising</td>
<td>Fundraising</td>
<td>Communication</td>
<td>Staff feel out of touch with other sections of Organisation C and often find deadlines compressed, as they were perceived as unable to consult on marketing initiatives before they took place.</td>
<td>Staff in Fundraising will attend each marketing team meeting on a regular basis. One person in Fundraising is responsible for organising and monitoring this. Those in attendance will then report back on timelines and initiatives occurring in Marketing</td>
<td>Xxxx is responsible for organising attendees for each marketing meeting.</td>
<td>Staff from marketing now attend fundraising meetings. Knowing more about one other’s functioning allows each department to be more considerate of the other. Several deadlines have been extended to accommodate the needs of one or the other group. Overall, staff consider this successful. They feel it has improved their issues around communication and plan to respond more positively in the survey.</td>
</tr>
<tr>
<td>Operations</td>
<td>Marketing &amp; Fundraising</td>
<td>Fundraising</td>
<td>Issue 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations</td>
<td>Marketing &amp; Fundraising</td>
<td>Fundraising</td>
<td>Issue 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
action plan – example 2

The xxxx Engagement Survey is a strategic initiative designed to foster a highly engaging work environment. All departments are expected to work on at least one action from the survey over the coming year and are required to have a plan. All plans will be reported to the Managing Director at the end of January, March, June and September.

Goals are expected to reflect the SMART principles of being Specific, Measurable, Achievable, Realistic and have a Targeted completion date.

<table>
<thead>
<tr>
<th>SMART Goal</th>
<th>Action Plan</th>
<th>Target Date</th>
<th>Progress (to date)</th>
<th>Progress Assessed by follow-up Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve engagement by improving staff's perception of key factors as diagnosed by the staff survey.</td>
<td>Work group to review the detail in the survey and discuss potential actions for key drivers.</td>
<td>xx/xx/xx</td>
<td>Managers and staff have reviewed the results in January and are now forming a workgroup of staff to decide actions around communication, including open ended responses, structured responses and responses from meetings.</td>
<td>Communications score has risen to 70% favourable in follow-up survey in 20xx survey.</td>
</tr>
<tr>
<td>Improve communication by forming a workgroup of staff to decide actions around communication, including open ended responses and structured responses from meetings.</td>
<td>Staff are reporting a lack of communication in their work.</td>
<td>xx/xx/xx</td>
<td>Voluntary working group formed and have had first meeting reviewing the communication items and text responses.</td>
<td>Communications score has risen to 45% in follow-up survey in 20xx.</td>
</tr>
</tbody>
</table>

Current Situation (Data)

- Engagement score in survey = 55% favourable (low)
- Communication score in survey = 29% favourable (low)
- Staff are reporting a lack of communication in their work.
communicating progress

example communication

What we did following the results from our 20XX Voice Survey

(a) Thanked the staff for their participation
(b) Recognised and rewarded staff groups for their participation
(c) Road show across all work places with results of the survey
(d) Developed action plan to address areas where staff told us we needed to improve

Specific Action to Improve Communication and Co-operation

Stopped sending communication messages on ‘letter head’ stationery

Started using colourful, well-designed and sometimes large posters to get our messages out & read

Listened to staff and started attaching messages to payslips

Continued to reward & recognise staff

Focus groups with staff in the regions asking:

- What do you want to know?
- What don’t you want to know
- What is the best way to communicate with you?

Regular communication & teamwork education

Increased our organisation orientation from 1 to 2 days
What has really worked for us?

- Use of payslips
- Colourful communication messages
- Very visible Regional Director
- Recognition and rewards
- Staff education