Attached is the People Manager's Guide that defines the process in handling EOS results, as well as many tips in implementing the process effectively. In summary, the process calls for each manager, for his/her unit/dept. to do the following:

1) Analyze results and determine/develop content to present to staff.
2) Present the results, focusing on top 3 positives and top 3 issues.
3) Involve employees in defining and implementing a maximum of (3) action plans addressing the issues.
4) Implement action plans.
5) Report action plans and progress to organization and unit employees on a regular basis.

EMPLOYEE OPINION SURVEY - PEOPLE MANAGER'S GUIDE

As a manager, you are expected to know, understand, and respond to the interests and concerns of your employees. You are also expected to serve as the primary communications link between those who report to you and higher management. Being sensitive or aware of the environment in which your team is working is very important and by being "tuned in" to employee attitudes, you can often anticipate problems and take the kind of action which is necessary for maintenance of productivity, efficiency and staff engagement.

The annual Employee Opinion Survey (EOS) can be one of the most effective techniques for eliciting vital "attitude" information, without infringing on employee privacy. The objective of this guide is to help you be as effective as possible in using the results of the EOS to stay "tuned in" to your team members.

OVERVIEW OF EOS FOLLOW-UP PROCESS

Step 1: Manager (from front line managers through to the CEO/COO) conducts a results, discussion and action plan meeting with his/her direct reports as soon as possible after the EOS results are made available to managers.

Step 2: During or immediately after the meeting, the manager is to identify the top (3) Action Items to be initiated or participated in by the department and forward the information to their manager and Director of Human Resources for coordination in support of organization-wide efforts.

Step 3: Each manager (or identified teams which may include the manager and/or one or more direct reports) may take immediate action on items which are considered to be within their ability to impact.

Step 4: Second line and above managers are to review the EOS Action Items submitted by their direct and indirect reporting managers to identify potential cross-departmental items considered for the establishment and action of cross-departmental working groups.

Step 5: Ongoing and regular communications with employees, after the initial meetings, are CRITICAL to the effectiveness of the EOS process. Employees need to understand what action has been taken and to know that the action is in direct response to the information they provided on the survey. Even in cases where it has been determined that an issue cannot be resolved to the satisfaction of employees, this result should be communicated and explained. In addition to these updates from each manager, communications may be issued by second line and above managers on items which they have decided are to be addressed by cross-departmental working groups. It is important that all follow-up communications mention the EOS by name, and therefore remind employees of the link back to their completion of the survey.

Step 6: The EOS follow-up process concludes with active support and participation by managers in the distribution of the next year's EOS to employees.

PREPARING FOR THE INITIAL RESULTS DISCUSSION AND ACTION PLAN MEETING

Interpret the results so that you identify the areas you want to present and discuss at the meeting. You will need to identify both the areas that you interpret as being positive or encouraging, as well as the areas that appear to be causing concern. Please note that the areas identified will be your interpretation of the results. One of the meeting objectives is to confirm whether you have correctly interpreted the results.

In analyzing your EOS results, you may want to ask yourself the following questions:

- Is each result as favorable or unfavorable as I might have expected?
- How do the responses fit in with the department's current situation? (for example, a sizable negative response to a question on training would mean something quite different in a unit where there are many new hires as it would in one with long-established employees.)
- Are there apparent inconsistencies between two results? What might be causing this inconsistency?
- How do the results compare to the results of my overall unit or the overall company wide results?
- How did I react to the results overall?
- Did any result surprise me?
- How do the results relate to the environment/location in which the department works?
- How do the results compare to previous years (if available)?

It may be helpful for you to discuss your interpretation and conclusions with Human Resources, your manager and even other members of the management team. They are frequently able to add insights and explanations.

You, as manager, are in the best position to discuss survey results with your team. Face-to-face meetings with employees are the most effective way to present the results (using some form of visual aids – eg. the actual website data/bar charts or presentation slides) and encourage open discussion. Consider having more than one meeting.

Feedback sessions can have a significant impact on employees when they are planned to include sharing of information, better understanding of the issues and development of programs or actions for improvement.

Provide feedback to all employees within your department as soon as possible after you have the data.

GUIDANCE ON HOW TO PRESENT THE DISCUSSION TOPICS

- It is suggested the manager present first the positive or encouraging results, followed by the topics related to dissatisfaction or concern. Make a careful selection of topics so the presentation is tailored to the uniqueness of your team and the survey results. The key is to introduce the topics in a way that will promote an open exchange of information and ideas.
- It is recommended that you limit the number of topics to present to no more than five or six; preferably three, positive or encouraging areas; and approximately the same number of areas of dissatisfaction or concern. Focus your efforts on key priorities.
- It is useful to lead off with a topic that demonstrates your interest in improving the organization. Ideally, it's a topic with favorable responses and, if possible, where the results can be attributable to management action. An example might be favorable ratings of communications attributable to more effective departmental meetings or timely performance reviews. Such a topic is easy to talk about and will get the discussion off to a good start.
- The rest of your topics, except for the conclusion, should be ordered in terms of sensitivity. Start low and work up to the highly sensitive ones. The low sensitivity topic usually doesn't present a threat to the manager or employees, and it frequently lends itself to easy solution. Thus, the manager has an excellent opportunity to demonstrate his/her willingness to listen and respond; and work with his/her employees before they open up fully on more sensitive issues.
- It is important to finish on a positive note. Ideally the concluding topic should show long-term confidence in the organization and in your specific department.

CONDUCTING YOUR RESULTS, DISCUSSION AND ACTION PLAN MEETING

- Open by thanking your employees for attending and by emphasizing the importance of the EOS process to the organization, the management team and to you personally as manager and leader in the organization. Also emphasize your support of the management team's objective to clearly show to all employees, through ongoing action and communications, the value of the EOS process to each and every employee.
- Tell the team that you (or a designate/volunteer) will be taking notes during the meeting for the purposes of identifying the Top (3) Action Items.
- Talk trends and issues. Don't just read percentages or talk about the number who responded in a certain way. Present the data in terms of trends and issues.
- Offer tentative explanations. When you feel you understand the data related to a specific issue, offer your interpretation to the group and ask if they agree. If you have no explanation for the results, admit it and ask for their ideas.
- Don't imply you fully understand the data. If you jump to conclusions or indicate that you know it all, you'll simply cut off any constructive criticism that may be coming your way.
- Listen and probe. Listen very carefully to what your team members have to say. If a comment isn't clear, restate it in your own words and ask if that's what was meant. Don't assume anything until you feel comfortable with their explanations.

- Encourage your team members to participate. When an employee makes a suggestion, respond by showing your appreciation. Under certain circumstances, for example, you might say, "I never realized that was going on" or "Now that I understand, I'm sure I can do something about it". Focus your attention on the individual who is talking and try to maintain eye contact. Don't look around the room as if you want to move on to another topic. Be careful of the cues you give.
- Concentrate on improvements. When discussing negative items, ask for suggestions for improvement. Everyone should be urged to contribute.
- Don't be defensive. Don't "turn off" an employee by getting off the hook with clichés such as "That's not what I meant" or "You don't really understand what I'm trying to do". You're there to listen and respond.
- Avoid quick acceptance of one employee's explanation. The vocal ones in your group may not be representative of all the employees. Try to get other opinions before accepting an explanation.
- Proceed through your data topic by topic. If someone brings up an issue related to a topic to be discussed later, tell the employee to hold off until that subject comes up. And don't move off the current subject until you're satisfied that it has been fully explored.
- Pay attention to visual cues. If employees are frowning or staring at each other, it usually means they disagree with your view. If they look confused, you're losing them. If they're getting restless, it may mean that it's time to change subjects or that the meeting has gone on too long. In any of these cases, it's best to stop and find out why there is a problem.
- Don't be afraid to say you don't know. Bluffing seldom fools anybody. If you don't know the answer to a question, record it and promise to get back with an answer.
- Avoid statements that might single out one person. The easiest way to cut off free discussion is to ask, "Why did you respond that way on the survey?" Such statements are threatening to many employees, particularly since they've already been told that their answers would remain anonymous. For this reason, avoid using any expression, "you said" or "you indicated", that could be interpreted as personalizing the discussion.
- Take special care in discussing the more sensitive topics. Employees are frequently uncomfortable when discussing some questions, particularly those related to the manager. Try to encourage them by stressing how important the discussion is to your understanding of the problem. But be careful not to put them on the spot. Rather than ask outright, "What am I doing wrong?" concentrate on the problem by saying, "The data indicates a major weakness in the managerial area. Let's talk about it and see if we can develop some constructive criticism".
- Be aware of employee rationalization of the data. Sometimes embarrassment or uncomfortableness with certain questions will encourage employees to avoid a discussion by saying, "I didn't understand the question" or some like statement. A useful technique to prevent this from happening is to counter with, "Let's suppose, though, that this negative data is accurate. What could we do to improve?"
- Beware of premature commitments. Don't promise too much too soon. Better to agree you'll study a suggestion than to make commitments which may not hold up.

- Avoid the "not me" trap. It's easy to imply that many of the problems uncovered by the survey were caused by your manager or higher management. This not only undermines top management but it weakens your own authority.
- Consider carefully whether to use handouts, and when to distribute them. They can distract your audience and may be misused outside the meeting.
- Confirm the date and time of the next follow-up meeting.

DEVELOPING ACTION PLANS AND FOLLOWING THROUGH

One of the chief objectives of the EOS is to develop action plans in response to employee concerns.

- Clearly list each Action Item. Make the description as concise and specific as possible. Don't settle for vague definitions such as "poor communications". Instead, break down the subject into its components, "ineffective department meetings", or "little explanation of technical decisions", for example so that you can plan effective solutions.
- Prioritize action items to ensure focus on and assignment of resources to those top action items that will really make a difference. Commitment to a maximum of only (3) significant action plans is typically going to be more successful in achieving meaningful results.
- Welcome offers from your team members to run with resolving identified issues, rather than taking ownership of every item yourself.
- Your goal in developing an action plan is to find the simplest solution with the fewest negative side effects. Avoid cliché statements such as "improve communications". Instead, list all the specific and measurable ways you plan to accomplish this goal, such as "conduct monthly meetings" and "prepare and discuss with employees a detailed statement of the department mission".
- Be on the lookout for an action that might create new problems while solving an old one. For example, in improving department communications by requiring employees to submit a monthly progress report, you might find more dissension because of the added workload.
- Make sure you don't jump to conclusions. Better to tell your team that you want to study a problem more carefully before deciding on a rash course of action.
- Test your actions with these questions: Will it solve or help to solve the stated problem? What are the probable short and long-term consequences for your team, mission and other units? What are possible constraints? Does the action make good sense?
- Action plans tend to go the way of most good intentions unless you establish a system to track what actions are taken. Revisit your EOS Action Plans on at least a monthly basis to assess progress. Set realistic dates when you should begin and complete a given action. Commit yourself to these dates by communicating them to your manager and your employees. Schedule regular (at least quarterly) follow-up sessions with your team to let them know what progress has been made, and what actions are still in progress.
- Remind your team members that the EOS is only one source of information for management decision-making and they should not expect to see all the changes

they've suggested. They do have a right however to receive an explanation of why specific suggestions have or have not been adopted.

- In assessing progress on an action item, ask yourself: "Have I met the target dates for each Action Item?" If not, what is the explanation? Have my action plans effectively relieved, reduced or eliminated the problem? How do my team members feel about the problem area today? Will fine-tuning of the original action plans improve their effectiveness? Have my actions corrected one problem only to produce others? Has employee engagement improved at the expense of patient satisfaction, cost, efficiency or some other consideration?

CONCLUSION

One of a manager's most important responsibilities is to improve the organization and the working environment by acting on valid input. Effective survey feedback meetings not only validate inputs about the feelings of employees, they also raise expectations that management will take action to address concerns. The most serious concern about the survey process is that we sometimes fail to act on the input.

The EOS process begins with the distribution of the survey to employees and continues throughout the year, right up to the day prior to the distribution of next year's survey. The Management Team is committed to ensuring that we prove the value of the EOS process to our team members by ensuring that we understand their input, taking concrete action where possible, providing clear explanations when action is not taken and ensuring that team members make the link between their EOS responses and management action.