

Engagement Action Planning Toolkit

Manager resources and tools for having meaningful conversations about engagement and how to improve it.



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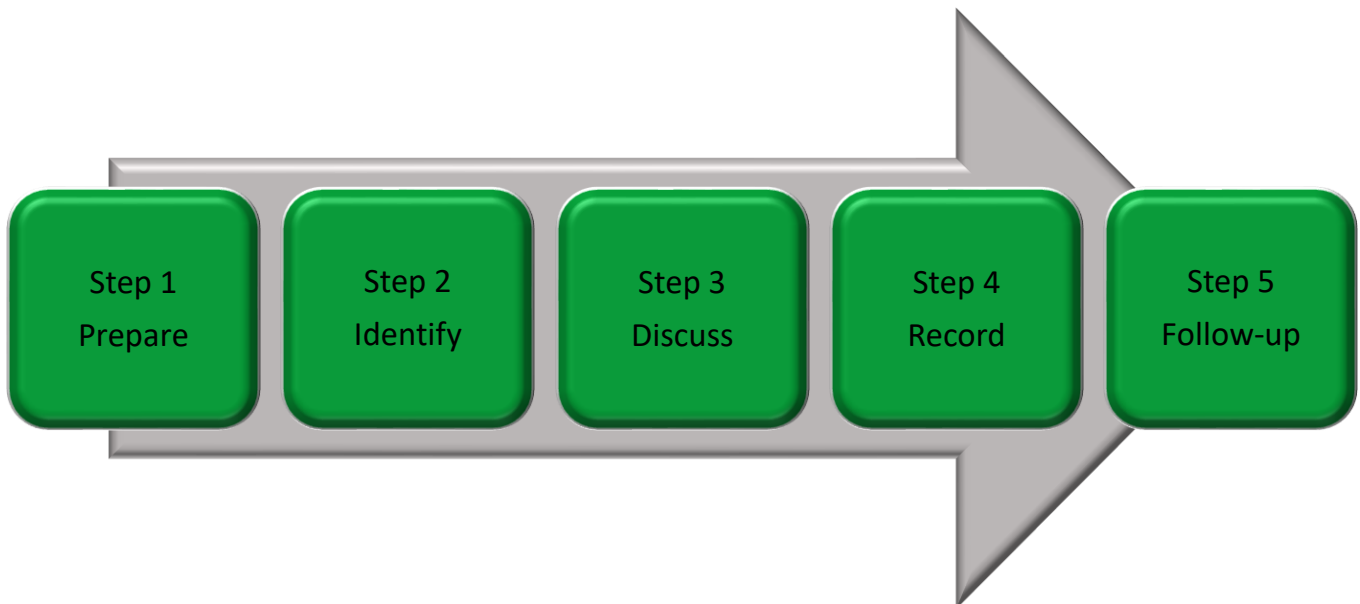
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Engagement Action Planning Toolkit

Process summary

The Gallup Engagement Action Planning Toolkit is a resource designed to help UNT System Enterprise managers develop and implement effective action plans to improve employee engagement.

Gallup's Recommended Action Planning Steps



The Action Planning Process

The most important part of the employee engagement survey process is collaboratively creating a team action plan. The action planning includes five steps to ensure that these plans are intentional and effective. To improve your team's work environment and increase performance, all team members must commit and contribute to an ongoing progress.

The process outlined in this toolkit will help you discover multiple findings based on the Q12 results to start a meaningful conversation. The best engagement discussions are those that are transparent, focused on solutions, and inclusive.

Step 1- Prepare: Review and analyze the Q12 results to prepare a conversation with your team.

Step 2 – Identify: With your team, find 1-3 of your lowest scoring item(s) and prioritize which item(s) that you want to improve engagement.

Step 3 – Discuss: Discuss with your team specific actions you will take as a team to improve your engagement score with the Q12 related items.

Step 4- Record: After team discussion, enter plan details into the Gallup Access Portal using the "Create New Employee Experience" action planning tool.

Step 5 – Follow-Up: This is an ongoing step that requires consistent follow-up and follow-through as the team continues to track progress.

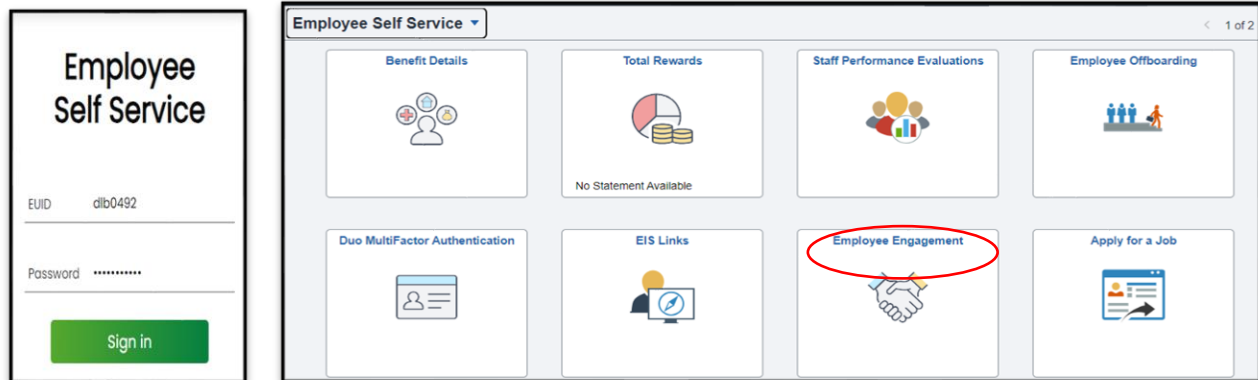
Let Us Get Started!

To begin action planning, log in to your Gallup Portal and find the action planning tool.

To access your Gallup Access Portal:

- ❖ Log in to your "Employee Self-Service" page using your EUID and password credentials.
- ❖ Click on the "Employee Engagement" tile.

Employee Self Service | UNT System



- ❖ Navigate down to the Gallup Portal and click the "Gallup Survey Results" hyperlink.

Gallup Portal: [Click Here for Gallup Survey Results](#)

Once you open the Gallup Portal, continue to the first step of your action planning process.

Step 1 – Prepare

Review and analyze the Q12 results to prepare a conversation with your team.

Download Q12 Report

The Q12 is a Gallup assessment that measures employee engagement. It is a 12-item survey that asks employees about their thoughts and feelings about their work and their workplace.

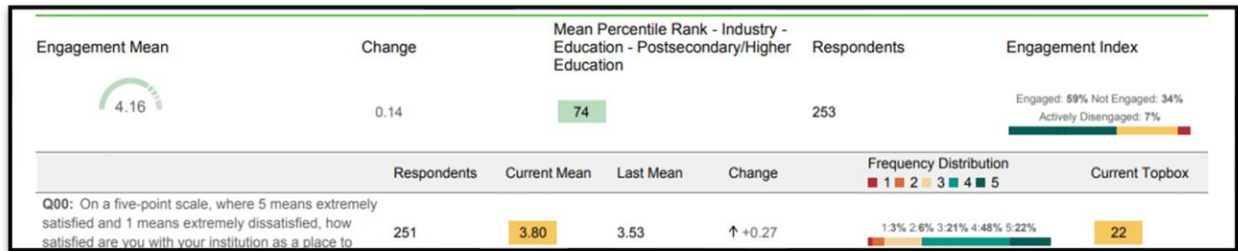
Before having a Gallup conversation about employee engagement using the Q12 results, please follow these instructions to access the Gallup Q12 One Pager:

- ❖ Click on the "Menu" dropdown and select "Reports."
- ❖ Select the survey report for your campus, or the System Administration.
- ❖ From the "Teams" dropdown menu, enter your name to bring up your team's survey results.
- ❖ Click on the "Export Options" button, select the "Single Report" option.
- ❖ Select the "Q12 Summary one Pager" report and click "Create".



(Note: The Q12 One Pager will be downloaded to your computer as a PDF file. You can then open the file to view and print the results. View full Q12 download in Appendix A.)

Q12 One Pager Snapshot



To prepare for the conversation about low engagement scores, encourage each team member to review the Q12 report. This will help everyone to understand the team's engagement scores and to name any areas where improvement is needed.

It is important to invite everyone on the team to take part in the conversation about improving engagement. This is an opportunity for everyone to share their thoughts and ideas on how to improve employee engagement.

To navigate the discussion, use the Q12 report, sample follow-up conversation, and guiding questions. The Q12 report will provide you with data on your team's engagement scores. The sample follow-up conversation and guiding questions can help you to start a productive discussion about the data and to name potential solutions for improving employee engagement.

Sample Conversation

Once each team member has reviewed the results, the team can begin the conversation by naming areas where engagement is low and how to improve.



"Thank you for joining the meeting today, if you remember in October you were asked to take the Gallup engagement survey that asked questions about your overall experience at work. I wanted to have a follow up conversation about our team's engagement because it is important to know how we can improve our working environment for everyone so that we can be a more productive and higher performing team. It is important for us to look at these results and have a dialogue about what these questions mean to you and later brainstorm some action items that we can implement to improve engagement."

Guiding Questions

1. How do you define each of the Q12 related items?
(For example, what were you thinking when you answered, "materials and equipment" question?)
2. Now that you defined each of the Q12 related items, what changes would have to happen to score each question a "5"?
3. What is the difference between where we are now and where we want to be?
4. As we think about our engagement action plan, which items have the greatest impact on our culture or performance?
5. What is every person on the team willing to do about engagement?

Step 2 – Identify

With your team, name 1-3 of your lowest scoring item(s) and prioritize which item(s) that you want to improve engagement.

With your team, name 1-3 areas of low engagement (paying close attention to scores shaded in yellow and red) and prioritize a list of related Q12 items to improve. Use your team members’ diverse perspectives to understand your team’s current engagement story and your desired future state. Review an example of a related item in the text box below.

View full sample report in Appendix A.

Engagement Mean	Change	Mean Percentile Rank - Industry - Education - Postsecondary/Higher Education	Respondents	Engagement Index		
4.16	0.14	74	253	Engaged: 69% Not Engaged: 34% Actively Disengaged: 7%		
	Respondents	Current Mean	Last Mean	Change	Frequency Distribution	Current Topbox
Q00: On a five-point scale, where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with your institution as a place to work?	251	3.80	3.53	↑ +0.27	1.3% 2.8% 3.21% 4.48% 5.22%	22
Q01: I know what is expected of me at work.	252	4.25	4.09	0.16	1.2% 2.8% 3.10% 4.33% 5.50%	50
Q02: I have the materials and equipment I need to do my work right.	252	4.17	3.84	↑ +0.33	1.9% 2.8% 3.13% 4.37% 5.44%	44
Q03: At work, I have the opportunity to do what I do best every day.	250	4.06	3.87	0.19	1.1% 2.7% 3.16% 4.36% 5.39%	39

Opportunity →

(Note: The Gallup Engagement Survey database includes academic divisions, student services entities, and departments within universities and colleges; colleges, universities, and professional schools; and technical and trade schools that take part in the survey. Our Education - Postsecondary/Higher Education database allows you to compare your institution's performance to other institutions in the database.)

When viewing the Gallup Q12 report, focus on the items that are coded yellow or red, as these show low-scoring areas considered as opportunities to improve.

The Gallup Q12 report uses a color-coded system to represent the percentile when comparing against other higher education institutions team's engagement scores for each of the twelve related items. The colors are as follows:

- ❖ **Green:** The team's score is above the 50th percentile, which means that the team is performing better than half of the teams in the Gallup database.
- ❖ **Yellow:** The team's score is between the 26th – 49th percentile, which means that the team is performing average.
- ❖ **Red:** The team's score is below the 25th percentile, which means that the team is performing worse than half of the teams in the Gallup database.

When you are reviewing the Gallup Q12 report, focus on the items that are coded yellow or red. These are the areas where your team has the greatest opportunity for improvement.

Example of Q12 Related Item

Name a list of Q12 related items that your team wants to improve. For example, if your team scores are low in “I know what is expected of me at work,” you can use this as an opportunity to improve your communication as a manager and ensure your employee have clear expectations for their role.

Step 3 – Discuss

Discuss with team specific actions you will take as a team to improve your engagement score with the related Q12 question.

To avoid getting overwhelmed, we recommend discussing 1-3 related items with the lowest Q12 scores or those that are most important to your team.

Discussion Guidelines

- ❖ Be specific about areas that need improvement.
- ❖ Focus on things that you can control.
- ❖ Consider resources that you have available to support.
- ❖ Set realistic deadlines.

Provide the Plan Details

Use the following fields to discuss and record the details of your plan:

Related Items	Use the drop-down list to choose 1-3 Q12 related items with the plan for the team to focus on.
Topics (Optional but recommended)	Use the drop-down to choose up to three subjects with the plan.
Goal	Type the plan’s primary purpose, specifying what success looks like (maximum of 250 characters).
Description (Optional but recommended)	Type specific actions and activities that will take place to complete the plan (maximum 4,000).
Due Date	Click this field to display the date selection calendar and use the calendar to choose a deadline for completing the plan.

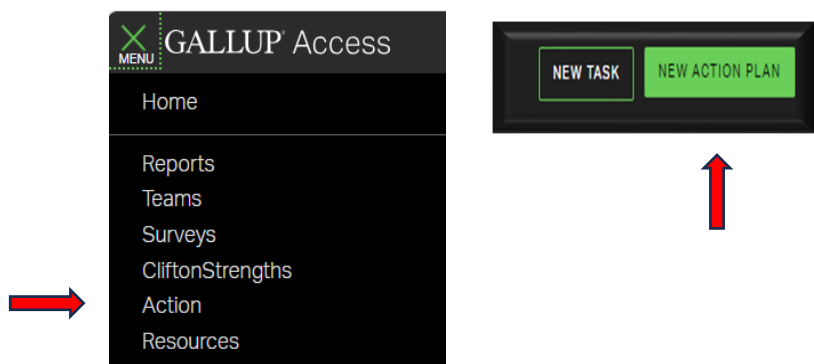
Step 4 – Record

After team discussion, enter plan details into the Gallup Access Portal using the “Create New Employee Experience” action planning tool.

Create a New Action Plan

Once you have named 1-3 Q12 related items to improve, prepare to prioritize the Q12 related items. Return to the Gallup Portal and:

- ❖ Click on the “Menu” dropdown.”
- ❖ Select “Action.”
- ❖ Click on “New Action Plan” button.



Create a New Employee Experience Plan

Type a concise description in the “Plan Name” field to name the plan. For example, you could name it “Employee Experience Improvement Plan” or Employee Engagement Action Plan.”

Create a New Employee Experience Plan
Type a descriptive name for your plan, and select the report and team to associate it with.

* Plan Name
2023111 Q01 Expectations

- ❖ From the “Report” drop-down menu, select your survey report.
- ❖ From the “Teams” drop-down menu, select your supervisor's name.
- ❖ Click Next.

Report

2022 UNT System Administration Employee E...
All
2022 UNT System Administration Employee Engagement Survey
2022 UNTHSC Employee Engagement Survey
2022 UNT Dallas Employee Engagement Survey
2022 UNT Employee Engagement Survey
2021 UNT System Administration Employee Engagement Survey
2021 UNTHSC Employee Engagement Survey
2021 UNT Dallas Employee Engagement
CLEAR

Team

Adair, John
All
Mears, Paula
Meyer, Kevin
Miles, R
Minter, Anthony
Morgan, Janna
Morrow, Michael
Murthy, Gulnaar
Myre, Alexandra
Myre, Jason
CLEAR

Once you have selected the survey report and your supervisor's name, you can add the plan details you discussed as a team.

Name, Report & Team
Details & Due Date
Review

Provide the Plan Details
Select the related items and topics for the team to focus on, and type an actionable goal for your plan. [View a sample plan](#) for help.

Related Items (3 max)
High- and low-ranking items apply only to direct team data.
Choose...

Topics (3 max)
Choose...

Goal
Suggestion: Discuss with the team what helps or hinders this item or concept.

+ Add Description

* Due Date (MM/DD/YYYY)
MM/DD/YYYY

*Note: You can download a sample plan and view a completed sample action plan in **Appendix A***

Choosing related items

Select the Q12 related items for the team to focus on. Use the drop-down list and choose 1-3 Q12 related items that your team discussed to focus on.

Selecting topics (optional)

Use this drop down to select up to three workplace topics that are related to your plan. These topics will help the Gallup Access platform direct you to articles, best practices, and other Gallup research that may be helpful in improving the areas of engagement that you are focusing on in your action plan.

Action Planning Goal

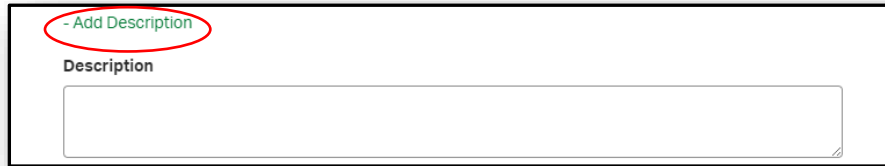
The action planning goal supplies a clear and specific target for your improvement efforts. It should summarize the overall focus and purpose of your action plan and should describe what success on these items would look like.

Some specific benefits of having a goal for your Gallup action plan include:

- ✓ **Focus:** Having a goal helps you to remain focused on the most critical areas for improvement.
- ✓ **Measurement:** It allows you to measure your progress over time.
- ✓ **Motivation:** Working towards a goal makes it easier to keep focus and overcome challenges.

Description Box (optional)

The description box is an optional field but recommended. It is used to supply more information about the action item. This could include specific steps that need to be taken, the resources that are needed, the timeline for completion, some of the specific feedback from your team that helped you decide on your goal, and the individual or team responsible for completing the action item.



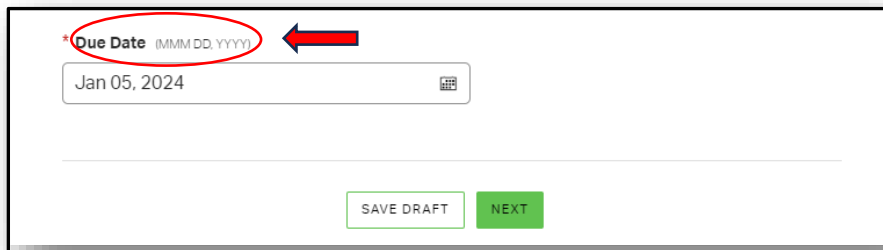
Here are some of the benefits of using the description box in Gallup action planning:

- ✓ **Clarity:** It can help to clarify the action item and make sure everyone involved understands what needs to be done.
- ✓ **Specificity:** The description box can help to make the action item more specific and actionable.
- ✓ **Accountability:** It can be used to hold people accountable for completing the action item.
- ✓ **Communication:** It can help communicate the action item to others and get them involved in the process.

Selecting a Due Date

The Gallup action planning due date is important because it helps to ensure that action items are completed on time, and that the organization is making progress towards its goals. The due date allows you to set regular milestones and check points.

Click next to continue.

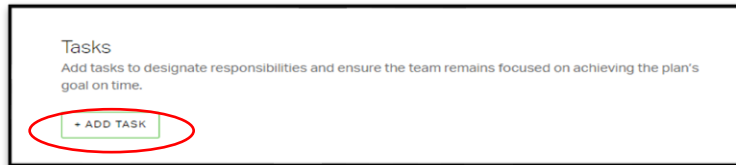


In the “Review Plan” stage of the action plan process, ensure that all information is accurately recorded and agreed upon by the team. Make any necessary adjustments. The supervisor will be able to make ongoing edits to the plan.



Add Task

Add tasks to appoint responsibilities and ensure the team still is focused on achieving the plan's goal on time.



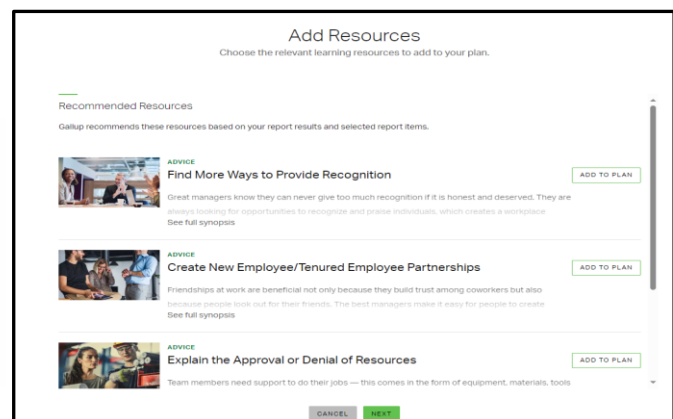
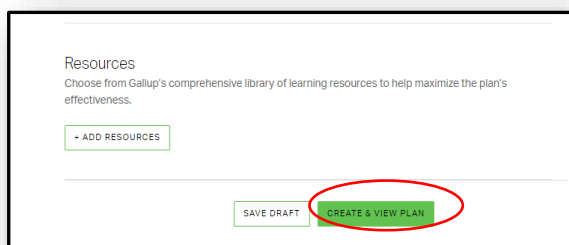
Note: It is important to make sure that each team member has the skills and resources necessary to complete their assigned tasks.

To add a task to your Gallup action planning review plan, consider these questions:

- ❖ Is the task related to a specific Q12 item, employee feedback, or observation?
- ❖ Is the task specific, measurable, achievable, relevant, and time-bound?
- ❖ Can the task be broken down into smaller, more manageable steps?
- ❖ Is the task assigned to the right team member?
- ❖ Is the deadline realistic and achievable?
- ❖ Who will track the progress?
- ❖ How will the task be adjusted as needed?

Add Resource

Adding a resource will help ensure that you have the necessary support in place to implement your plan and track your progress.



Note: Your resource needs may change over time. As you implement your plan, you may need to add or remove resources as needed.

Communicate the addition of the resource to your team. This will help to show that everyone is aware of the new resource and how it can be used to help complete the action items.

You will be able to view the full recorded plan by clicking the “Create & View Plan” feature.



Once the action plan has been completed, you need to implement it and track progress. It is important to consistently communicate the action plan to team members and to keep them updated on progress. See a completed sample action plan in **Appendix A**.

After careful review of your newly created action plan, click the “Mark as Complete” button to set up the action plan, share with your team, and continuously track progress.

Note: Before selecting the “mark as complete” button, you can access the “more” button to make last minute adjustments. You can also use this feature to download or remove the plan. After you mark your plan as complete, you may continue to edit at any time.

Employee Engagement Action Plan

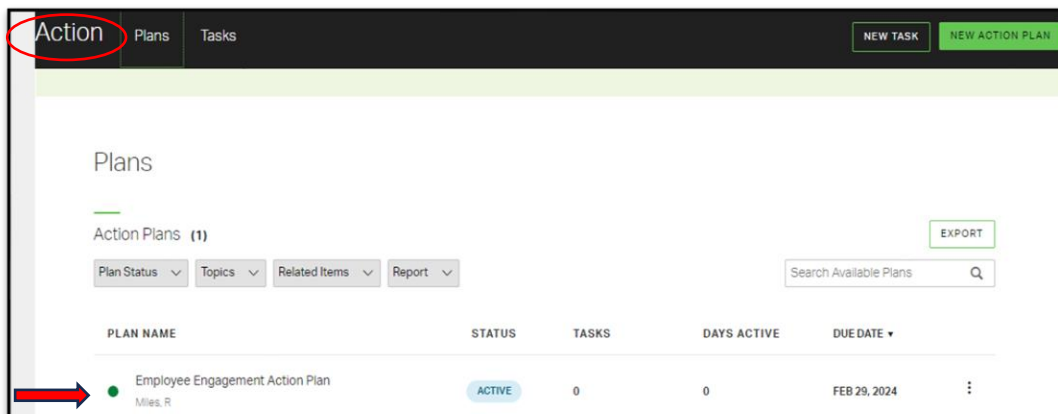
2022 UNT System Administration Employee Engagement Survey | Miles, R

DUE DATE	TASKS	ISSUES	STATUS	CREATED
FEB 29, 2024	0	0	ACTIVE	OCT 12, 2023



The “Mark as Complete” feature allows you to mark an action plan as complete once all the steps in the plan have been completed.

Once you have marked an action plan as complete, it will be moved to the “Plans” tab. You can still view the completed action plan by clicking on the name of the plan in the “Plans” tab.



Step 5 – Follow-Up

This is an ongoing step that requires consistent follow-up and follow-through as the team continues to track progress.

By following these follow-up steps, you can ensure that your action plan is successful and that you are making progress towards improving employee engagement in your organization.

- ❖ **Review the action plan with your team.** Once you have created an action plan, it is important to review it with your team to make sure that everyone understands the plan and that everyone is committed to implementing it.
- ❖ **Track the progress of the action plan.** It is important to track the progress of your action plan over time to make sure that it is on track and to name any areas where more support is needed.
- ❖ **Communicate with your team about the progress of the action plan.** It is important to communicate with your team about the progress of the action plan on a regular basis. This will help to keep everyone engaged and motivated.
- ❖ **Celebrate your successes!** It is important to celebrate your successes along the way. This will help to keep your team motivated and to show them that their efforts are making a difference.

Note: Gallup also recommends that you revisit your action plan on a regular basis to make sure that it is still meeting the needs of your team and that it is still aligned with your organization's goals.

APPENDICES

Appendix A Sample Q12 One Pager

EMPLOYEE ENGAGEMENT REPORT 2022 UNT SYSTEM ADMINISTRATION EMPLOYEE ENGAGEMENT SURVEY						
ALL - ALL OCT 03, 2022 - OCT 15, 2022						
Engagement Mean	Change	Mean Percentile Rank - Industry - Education - Postsecondary/Higher Education		Respondents	Engagement Index	
4.16	0.14	74		253	Engaged: 59% Not Engaged: 34% Actively Disengaged: 7%	
	Respondents	Current Mean	Last Mean	Change	Frequency Distribution	Current Topbox
					1 2 3 4 5	
Q00: On a five-point scale, where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with your institution as a place to work?	251	3.80	3.53	↑ +0.27	1.3% 2.8% 3.21% 4.48% 5.22%	22
Q01: I know what is expected of me at work.	252	4.25	4.09	0.16	1.2% 2.5% 3.19% 4.33% 5.50%	50
Q02: I have the materials and equipment I need to do my work right.	252	4.17	3.84	↑ +0.33	1.0% 2.6% 3.13% 4.37% 5.44%	44
Q03: At work, I have the opportunity to do what I do best every day.	250	4.06	3.87	0.19	1.1% 2.7% 3.16% 4.36% 5.39%	39
Q04: In the last seven days, I have received recognition or praise for doing good work.	246	4.08	3.96	0.12	1.5% 2.8% 3.11% 4.26% 5.50%	50
Q05: My manager, or someone at work, seems to care about me as a person.	249	4.53	4.45	0.08	1.2% 2.2% 3.5% 4.24% 5.67%	67
Q06: There is someone at work who encourages my development.	250	4.18	4.04	0.14	1.4% 2.4% 3.12% 4.27% 5.52%	52
Q07: At work, my opinions seem to count.	250	4.03	3.82	↑ +0.21	1.2% 2.8% 3.15% 4.32% 5.42%	42
Q08: The mission or purpose of my institution makes me feel my job is important.	248	4.04	3.91	0.13	1.4% 2.6% 3.15% 4.35% 5.41%	41
Q09: My colleagues are committed to doing quality work.	250	4.44	4.35	0.09	1.1% 2.2% 3.9% 4.30% 5.59%	59
Q10: I have a best friend at work.	240	3.86	3.77	0.09	1.8% 2.7% 3.16% 4.28% 5.41%	41
Q11: In the last six months, someone at work has talked to me about my progress.	247	4.11	4.13	-0.02	1.5% 2.6% 3.12% 4.26% 5.51%	51
Q12: This last year, I have had opportunities at work to learn and grow.	247	4.17	4.00	0.17	1.3% 2.9% 3.9% 4.30% 5.51%	51

Appendix B – Sample Action Plan

Employee Experience Plan Example

Employee Experience Plan

Plan Name: Enhancing Feedback and Development

Due Date: 30 days after survey results release; then follow up every month

Report: Sample EE Survey

Team: Amy Lo

Topics: Development, Productivity

Related items: Q04. Recognition, Q11. Progress

Goal: Ensure team members feel they have career growth opportunities in their roles and in the company.

Description: To ensure we create a work environment where people have ways to learn and grow, we need to improve feedback and development for each team member through various individual and team touchpoints.

Tasks:

1. **Task Name:** Create a Plan for Development

Description: Have individualized developmental discussions between the manager and each team member to find out what “development” means to each person.

During the talk with each team member, create a short, individualized plan based on two things they believe will support their development. Some ideas include starting a new project, shadowing another team member, setting up informational interviews with people in your organization to learn about other roles, attending skill development sessions, reading articles or books, etc.

Check progress both four and eight months after this discussion.

Due Date: 45 days after the team reviewed survey results

Action Plan: Enhancing Feedback and Development

2. **Task Name:** Give More Feedback

Description: Share resources from Gallup Access on why feedback and recognition are vital.

Discuss how team members can start acknowledging each other for hard work. Then, during weekly team meetings or team huddles, have team members recognize others' efforts.

Have the manager give team members feedback as people work. The goal is to provide at least three feedback “moments” per week. This feedback could include:

Employee Experience Plan Example

- discussing how the person could handle a situation better
- talking about what the team member did really well in a situation, which could mean their approach to a specific task or tense situation they were able to deescalate or how they handled an internal or external customer

Recurring: Monthly

Action Plan: Enhancing Feedback and Development