



## 2024 WORKPLACE EXPERIENCES SURVEY

# Action Planning Toolkit for Managers

### How to use this toolkit

This toolkit is designed to guide **Managers and Administrators** through sharing your local-level results of the 2024 Workplace Experiences Survey (WES) with your team/department, and in facilitating conversations around developing actions and priorities that will focus on improving your team's engagement in meaningful ways.

While this toolkit is designed for unit-level action planning, the insights from WES also help to inform programs and initiatives at the institutional level that complement unit-level actions. The survey offers insights into the progress of efforts being made to ensure UBC is a diverse, inclusive, safe and vibrant workplace.

### Step ①: Preparing for your conversations

Acting on faculty and staff feedback is essential for fostering workplace engagement and strengthening trust within the team and organization. Research shows that employees are 4 times more engaged at work and have a 75% increased trust in leaders when they see actions being taken based on employee feedback (McLean & Company, 2024).

Refer to slides 4 to 10 in the [WES Briefing Session deck](#) for best practices and frameworks for managing difficult/sensitive conversations and in engaging your team in meaningful dialogue around workplace engagement.

## **Step ②: Review the results and share with your team**

After reviewing your WES report, share the results with your faculty and/or staff during a dedicated meeting, townhall or other forum for discussion that is most appropriate for your work environment. This is an opportunity as a leader to demonstrate to your team that you value their insights and want to understand the feedback and get context for the results.

Refer to slides 13 to 22 in the [WES Briefing Session](#) deck for information on how to understand and interpret the results. Refer to Page 1 of the [Action Planning Conversation Guide](#) for discussion prompts to support you in facilitating the results sharing conversation with your teams.

## **Step ③: Identify priorities and develop an action plan with your team**

After sharing the WES results with your teams, give them time to process the new information, reactions, or insights they may have about the results. Set aside time for a follow-up conversation to discuss strengths and priorities and begin developing an action plan to address the opportunities that stand out for your team.

Refer to slides 24 to 26 of the [WES Briefing Session](#) deck for more information on how to engage your teams in these discussions. Refer to Page 2 of the [Action Planning Conversation Guide](#) for discussion prompts to support you in facilitating the action planning conversation with your teams.

## **Step ④: Implement your action plans**

The important work is not done once the action plans are developed. The team should continue to oversee progress and adjust where necessary.

The following supplemental guides provide you with curated resources and suggested first steps if your team has identified one of these areas as a priority for action from your conversations:

[Supplemental Resource Guide: Professional Growth](#)

[Supplemental Resource Guide: Inclusion & Respect](#)

[Supplemental Resource Guide: Health & Wellbeing](#)

## Step 5: Review and assess progress on action plans

Continue to monitor progress on your team's action plans and adjust where necessary. Decide with your team on the cadence and forum for checking in and evaluating progress on those plans. Some actions address longer-term opportunities while others support easier changes, so timelines will vary with each action. Don't forget to celebrate your team's progress and document lessons learned along the way.

### Navigating common tensions in action planning

Sometimes, the team may feel “stuck” during the action planning process. Recognizing and naming the cause of feeling “stuck” is an important first step to identifying a path forward. Try to find a balance between common tensions in action planning but also accept that there is no perfect balance. Take small steps to make progress, while reflecting on and monitoring the tension.

