



Best Places to Work **GUIDE**

Chapter 2: Action Planning

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The *Best Places to Work* guide is the first-ever collection of tools, tips and guidelines to help agencies better understand their *Best Places to Work* data and use it to improve the workplace environment in a way that also improves organizational effectiveness.

The guide will be released online at bestplacestowork.org as a series of chapters:

Chapter One: Understanding Your Data and Communication (June 2009)—Gain an in-depth understanding of what your data mean to better focus and set priorities during action planning. Enhance two-way communication across all levels of your organization to engage key stakeholders in improving employee satisfaction.

Chapter Two: Action Planning (July 2009)—Use your data to develop a viable plan of action and maintain stakeholder engagement to ensure long-term support and resources for the effort.

Chapter Three: Sustaining Results (August 2009)—Incorporate the commitment to improve the workplace environment into the agency's culture and broader mission and sustain progress over time. Document lessons learned and start planning for future action.

BEST PLACES TO WORK GUIDE

ACTION PLANNING

By now, you have likely gathered and organized your *Best Places to Work in the Federal Government* data sets, identified your top drivers of employee satisfaction and either started the improvement initiative yourself or created action teams to begin the process. Senior leadership is probably eager for rapid changes to achieve better employee satisfaction and a more committed, engaged workforce.

Your agency or subcomponent can take a number of approaches to improve employee satisfaction, depending on issues the data identify that you should address, your organizational mission and culture and available time and resources. Some organizations select interested and talented individuals with varied experiences to serve on action planning teams, while others choose to appoint one person to gather input and develop recommendations. This chapter presents our recommended approach to *Best Places to Work* action planning. Many agencies have successfully employed these strategies in the past. While we recommend that a team consist of four to eight members, this process can be adapted to a team of any size.

This second chapter of the *Best Places to Work* guide will help you:

1. Initiate—finalize goals, confirm deliverables, determine resources, budget and time and define metrics for success;
2. Plan—identify key phases; and
3. Execute, Monitor and Control—complete the work activities in each key phase and stay on track.

Use the **Charter** and **Plan** templates in the **Action Toolkit** at the end of this chapter to create the core reference documents for your plan. These resources will help you create a series of informed, prioritized recommendations you can then use to fill in the Action Plan Worksheet in the Hay Group Excel Tool. For more ideas and inspiration, refer to the additional resources in the **Annotated Bibliography**.

ACTION PLANNING STEPS AND KEY ACTIVITIES

STEP 1: INITIATE	→	STEP 2: PLAN	→	STEP 3: EXECUTE, MONITOR AND CONTROL
<ul style="list-style-type: none"> Finalize Goals Confirm Deliverables Determine Resources, Budget and Time Define Metrics for Success 		<ul style="list-style-type: none"> Identify Key Phases Lay Out Activities in Each Phase Assign Owners, Start Dates and Completion Deadlines 		<ul style="list-style-type: none"> Complete Activities in Each Phase Stay on Track

STEP 1: INITIATE

Whether you're on an action planning team with an executive champion or working on your own, there are a few things you should do to structure and orient your action plan before you begin. Use the **Charter** template in the **Action Toolkit** at the end of this chapter to keep the project focused.

Finalize Goals

Work with your executive champion to identify and select the key areas for improvement by analyzing the priority matrix in your agency's Workplace Analysis Report. Together, finalize the goals and expectations for this action plan. For example:

- On which key drivers or issues will this initiative focus? (e.g., Effective Leadership, Work/Life Balance)
- What are the goals of this initiative? (e.g., improve communication across levels)
- Who will be responsible for implementing the recommendations? (e.g., this team, an implementation team, all senior staff, supervisors, etc.)

Confirm Deliverables

Confirm what specific deliverables your executive champion will expect during and after the action plan. For example:

- What kind of deliverables will the team produce? (e.g., memo, report, presentation, a combination)
- How often will the team check in with its executive champion? (e.g., interim check-ins, one final briefing)
- Who will be the primary audience for any deliverables? (e.g., senior leaders, managers, staff)
- Will there be follow-up deliverables? (e.g., to assess results)

Determine Budget, Resources and Time

Review your cost estimates and resource requirements with your executive champion. He or she should provide a broad timeline for the entire effort, from planning through implementation. Identify any constraints, assumptions and potential risks moving forward. For example:

- What are the anticipated costs for the team to develop recommendations for the action plan and the initial estimated budget?
- What other resources are needed, and how will the team coordinate with managers across the organization? (e.g., facilitator, venue and staff time for focus groups or interviews)
- How much time does the team have to develop recommendations? What are the milestones for implementation?

Define Metrics for Success

Identify methods to measure success throughout the process of developing recommendations. For example:

- How will you collect and analyze information to generate metrics?
- How will you determine the progress of your action plan leading up to your recommendations?
- How will you measure the impact of the implementation of your recommendations, and in what time period?

TIP**Establish Team Ground Rules**

The action planning team should set ground rules for the project. These may include respect for one another and equal participation among members, to mitigate the risk of conflict later in the process. The team should clarify and assign basic roles and responsibilities. For example:

- Who will serve as team lead?
- What are the roles and responsibilities of the team members?
- What are the confidentiality concerns?
- Who will take notes during meetings?
- Who will communicate with senior leadership?
- How often will the team meet, and how?
- How will the team make decisions?

For more information on effective team practices, refer to *The Team Handbook, Third Edition* by Peter Scholtes or *Ground Rules for Effective Groups* by Roger Schwarz. Details about these resources are listed in the **Annotated Bibliography**.

ACTION PLAN: KEY PHASES

	STEPS	WHO IS INVOLVED
PHASE 1	Review <i>Best Places to Work</i> data and determine whether additional research is necessary	Team
PHASE 2	Conduct additional research, identify themes and benchmark best practices	Team, with senior executive approval and support
PHASE 3	Brainstorm and prioritize recommendations	Team
PHASE 4	Finalize recommendations, build a budget and engage key stakeholders	Team, with senior executive approval and support
PHASE 5	Implement recommendations	Team, with senior executive approval and support

STEP 2: PLAN

In step two, you will identify the key phases of the improvement project and lay out the specific activities and tasks your team will complete in step three. Agencies may face different challenges, but your action plan will most likely consist of the following phases in the table above.

Create an action plan with activities, duration and schedule.

Building off the goals and parameters stated in the **Charter**, list your plan's key phases, detailed activities, duration and schedule. Use this document as you research and develop recommendations for action. Use the **Plan** template in the **Action Toolkit** at the end of this chapter to fill in your own activities, set deadlines and assign specific responsibilities to team members. Read more about each of the five key phases below.

PHASE 1: Review *Best Places to Work* Data and Decide whether Additional Research is Necessary

Review *Best Places to Work* data.

Look at the workplace driver (or drivers) on which you will focus, and use the Hay Group Excel Tool to review the question-by-question responses that contributed to that score. This allows you to better understand what specific factors at your agency are behind that driver.

Determine whether additional research is necessary.

You may decide that you need more information to understand specific root causes. If you conclude that additional research is necessary, you can learn more about your workplace environment by holding town hall meetings, administering additional surveys or conducting focus groups. If you decide to pursue additional research, submit a related budget request to your executive champion for approval.

TIP**Choose Additional Research Methods**

There are a number of ways to gain a deeper understanding of your agency's workforce challenges, and each method has its strengths.

Town hall meetings allow staff members to ask questions and voice their concerns to managers and senior leaders in an open setting. They also allow employees across levels to engage in a real-time discussion.

Additional surveys allow staff, managers and leaders to respond anonymously to any specific outstanding questions that the team may have.

Focus groups let employees to speak at length on certain topics and allow the team to dive deeper into key areas of interest. Focus groups for staff members should be facilitated by a neutral third party and conducted separately from managers and leaders so employees can speak frankly and freely in a neutral setting.

PHASE 2: Conduct Additional Research, Identify Themes and Benchmark Best Practices

Conduct additional research, if necessary.

Complete the additional research efforts after your executive champion approves your budget. The key internal stakeholder groups identified for your communication plan in Chapter One may offer interesting perspectives and can be valuable sources of additional information on the state of your agency's workplace environment.

Identify themes.

If you conducted additional research, use the supplementary data to build themes that provide more insight into the specific nuances of your agency's challenges. If you did not conduct additional research, then define the root causes behind the agency challenges that you are addressing. These themes will help you figure out what kinds of best practices you will research in your next step.

Benchmark best practices.

Once you identify the specific issue (or issues) within your agency, review other organizations to benchmark best practices and determine how other groups address similar challenges. Examples of how agencies have approached this activity in the past include:

- Looking at agencies or subcomponents of similar size or mission. Use the “Compare Up to 3 Specific Agencies” function on the *Best Places to Work* Web site to see which agencies have higher scores in the relevant dimensions.
- Interviewing and/or reading about the practices of the top performing and most-improved agencies and subcomponents in the *Best Places to Work* rankings.
- Interviewing and/or reading about other organizations in the for-profit, nonprofit or state/local government sectors (and perhaps even foreign governments).

PHASE 3: Brainstorm and Prioritize Recommendations

Brainstorm recommendations.

Once you understand your agency's challenges, identify your themes and benchmark best practices, use your knowledge to brainstorm a set of concrete recommendations. To do this efficiently and effectively, you could ask a neutral facilitator to moderate your brainstorming session. During this initial brainstorming phase, team members should be encouraged to temporarily suspend judgment and offer any solution that might address your agency's challenges. See *TMP's Top Ten Brainstorming Tips* in the **Annotated Bibliography** for guidelines that may help you during the brainstorming process.

Another approach is to solicit ideas from the entire agency staff. You could build an online forum where employees can submit their ideas to improve the workplace environment, and allow other employees to vote on submissions or hold an idea contest.

SPOTLIGHT ON**Transportation Security Administration (TSA),
Department of Homeland Security (DHS)**

The Transportation Security Administration's (TSA) index scores have risen steadily since 2005. One of the subcomponent's key initiatives has been to create “IdeaFactory,” an online system similar to a blog that is used to gather and share employee suggestions. Ideas that receive the greatest support from other employees may ultimately be implemented across the agency. “IdeaFactory” lets employees feel empowered as it expands the base of ideas for improving the workplace environment.

Prioritize recommendations.

Once your team has developed recommendations, prioritize them based on impact and effort and select the top ideas for implementation. Recommendations that are “low effort, high impact” will take the least amount of time and resources to implement, but will potentially have the biggest effect on employee satisfaction. Recommendations that are “high effort, high impact” are likewise expected to have a big effect on employee satisfaction, but they may require more energy to put into practice. Some recommendations may fall into the “low effort, low impact” or “high effort, low impact” categories; the energy and investment that these types of recommendations will require may not match the eventual payoff.

It's best to first focus on “low effort, high impact” recommendations. Then, you can move to those that are “high effort, high impact.” Avoid recommendations that are “high effort, low impact.” You can use the Effort v. Impact Analysis diagram at the top of the following page to structure your prioritization process.

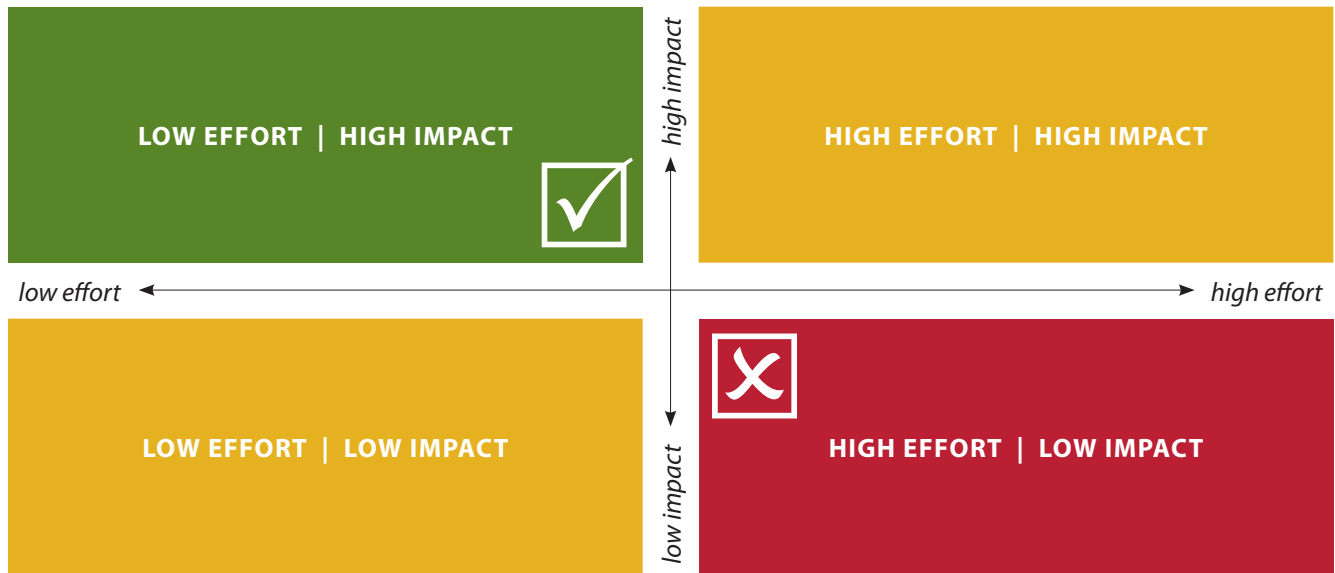
PHASE 4: Finalize Recommendations, Build a Budget and Engage Key Stakeholders

Finalize recommendations.

Once you have prioritized your recommendations, consider your agency's time and resource restraints as you select the top recommendations to implement. Use the Action Plan Worksheet in the Hay Group Excel Tool to match recommendations to the specific survey questions they address.

EFFORT V. IMPACT ANALYSIS

Prioritize: focus first on recommendations that are low effort, but high impact.

**Build a budget.**

Calculate how much staff time and other resources your final recommendations will require to implement. Create ranges for scale and spread, so that senior leaders can understand what their options are as they approve the budget. Include potential metrics for success so that your agency will be able to measure the effectiveness of your recommendations and the value of the investment.

Engage key stakeholders.

Complete your final deliverable(s), whether a memo, a report, a presentation or a combination. Use your findings from the *Best Places to Work* data, additional internal research and best practices benchmarking to build a business case for your final recommendations. Ensure that your final output is appropriate to engage stakeholders, especially senior leaders, and garner buy-in for the next step: implementation. You could also invite feedback on your recommendations so that others can have an opportunity to contribute.

PHASE 5: Plan How to Implement Recommendations

Communicate your recommendations and implementation plan to your organization.

Once approved, share your recommendations with employees throughout your agency so colleagues will know what to expect. Work with the appropriate leaders and managers to launch solutions and track success over time.

STEP 3: EXECUTE, MONITOR AND CONTROL

After you have agreed on a timeline and deliverables with your executive champion and identified the key phases and work activities for your action plan, it's time to complete each activity and make sure the plan stays on track. This section offers some tips on how to direct and manage the plan according to schedule.

Execute: Complete Activities in Each Phase

Reinforce stakeholder buy-in.

Wherever possible, engage the appropriate stakeholders in the improvement effort, from early planning through implementation. Reinforce their buy-in by keeping them involved; their energy and support will be essential for successful implementation of your recommendations. Once you complete your action plan document to develop and implement recommendations, you may consider announcing your plans agency-wide to inform employees about efforts to improve the workplace environment.

Complete work activities, collect status information and conduct meetings.

Direct and manage the plan according to the schedule, and stick to deadlines as best as possible to meet key milestones. Conduct regular project status meetings. The team leader should create an agenda and circulate it to

the group in advance of every meeting to facilitate an efficient and productive discussion.

Build team commitment and morale.

If you decide on a team approach, it's important to build and maintain team morale throughout the planning process. To limit team challenges, use the beginning of team meetings to check the team "pulse" and plan activities accordingly. Provide immediate and specific feedback to group members. The team leader should encourage full participation and recognize individual contributions to the group's work.

Share information.

The action planning team members should consistently share relevant information with each other. An Internet-based, file-sharing platform or shared server folder would help keep all documents organized in a central location. In addition to regular team meetings, the team should also check in with its executive champion (and other senior leaders) to discuss updates and challenges. Teams should also communicate progress to the rest of the organization as appropriate.

Assess quality.

Developing and executing a plan is an iterative process. Situations may change, and the plan may have to adapt accordingly. The team should periodically ensure that it is completing the activities laid out in the plan. The team should also manage the quality of the deliverables to be sure they are in line with the executive champion's expectations and re-evaluate the plan against the identified issues and risks.

Monitor and Control: Stay on Track

Monitor and control progress.

Compare progress against your action plan to track completed activities. Identify potential hurdles related to deadlines, deliverables and costs, and keep senior leaders appropriately informed of these issues. If the plan requires changes, update the plan with edits after they have been approved. Continue to keep key individuals and stakeholder groups apprised of your progress. Again, they can be valuable allies for your recommendations and will be an important part of the implementation process.

LOOKING FORWARD

Understanding your data, communicating with key stakeholders and developing an action plan all lead to this vital result: well-informed solutions to improve employee satisfaction. Your team's efforts to create a plan for developing and implementing recommendations to improve the workplace environment are critical to helping your agency better achieve its mission. A committed and engaged workforce will result in higher productivity and help your agency better meet its goals. *Chapter Three: Sustaining Results* will help you with next steps after you have implemented your recommendations.

ACTION TOOLKIT

Charter Template

Team Members**Goals**

List one to three strategic goals for this action plan.

Deliverables

List the deliverables that the team will be expected to produce at the end of the planning process and corresponding due dates.

Budget, Resources and Time

List the estimated initial budget and resources required to develop recommendations.

Specify the timeline set by the executive champion for developing recommendations and implementation.

Metrics for Success

List the measures that your team will use to determine your action plan progress leading up to recommendations and the impact of the recommendations themselves. Consider:

How will you collect and analyze information to generate metrics?

How will you determine the progress of your action plan leading up to your recommendations?

How will you measure the impact of the implementation of your recommendations and in what time period?

ACTION TOOLKIT

Plan Template

KEY PHASES AND EXAMPLE ACTIVITIES

The key phases of your action plan are outlined below. For each of these phases, identify the specific activities your team will undertake to complete that phase. Use the template on the following page to identify specific timelines and roles and responsibilities. Example activities are included below for your reference.

ACTION PLAN: KEY PHASES

	STEPS	WHO IS INVOLVED	SUGGESTED TIMELINE
PHASE 1	Review <i>Best Places to Work</i> data and determine whether additional research is necessary	Team	Month 1
PHASE 2	Conduct additional research, identify themes and benchmark best practices	Team, with senior executive approval and support	Month 2
PHASE 3	Brainstorm and prioritize recommendations	Team	Month 3
PHASE 4	Finalize recommendations, build a budget and engage key stakeholders	Team, with senior executive approval and support	Month 4
PHASE 5	Implement recommendations	Team, with senior executive approval and support	Month 5 and beyond

ACTION PLAN: KEY ACTIVITIES

PHASE 1: Review <i>Best Places to Work</i> data and determine whether additional research is necessary			
Activity	Owner	Start Date	Completion Deadline
Use Hay Tool to identify and summarize root causes behind workplace driver: <i>Effective Leadership—Supervisors</i>			
Use Hay Tool to identify and summarize root causes behind workplace driver: <i>Effective Leadership—Empowerment</i>			
Decide whether additional research is necessary, and if so, what kind			
Draft detailed budget for additional research (if necessary)			
Check-in with executive champion			
Draft E-mail to update staff on team progress			

ACTION TOOLKIT

Action Plan Template

KEY PHASES AND ACTIVITIES

A Word version of this template is available for download at <http://bestplacestowork.org/BPTW/agencies/resources.php>

PHASE 1: Review *Best Places to Work* data and determine whether additional research is necessary

Activity	Owner	Start Date	Completion Deadline

PHASE 2: Conduct additional research, identify themes and benchmark best practices

Activity	Owner	Start Date	Completion Deadline

PHASE 3: Brainstorm and prioritize recommendations

Activity	Owner	Start Date	Completion Deadline

PHASE 4: Finalize recommendations, build a budget and engage key stakeholders

Activity	Owner	Start Date	Completion Deadline

PHASE 5: Implement recommendations

Activity	Owner	Start Date	Completion Deadline

ANNOTATED BIBLIOGRAPHY

Project Management Institute: <http://pmi.org>

The Project Management Institute (PMI) is the leading global association for the project management profession. This Web site provides additional resources on project management best practices and standards. The association also releases publications, including PM Network, PM Journal and PMI Today, and provides free access to selected articles.

Schwarz, Roger. *Ground Rules for Effective Groups*. Chapel Hill, NC: Roger Schwarz & Associates, Inc., 2002.

This booklet can help teams assess how best to operate. Schwarz lays out nine ground rules for effective groups that can help teams improve working relationships and group member satisfaction, improve quality and efficiency, and increase individual commitment to the team's objectives.

Scholtes, Peter R. *Team Handbook Third Edition*. Madison, WI: Oriell, Inc., 2003.

This book provides guidelines that can help teams be high-performing, effective and successful. It describes how teams can start quality initiatives, as well as information on different types of teams and strategies for leading change.

TMP Government. *Internal Communications Idea Sheet*. 2009.

TMP Government, a global expert in communications strategies, published this list of its top internal communications tips. This idea sheet can help you develop an internal message based on your needs and audience. Ideas include various digital, printed and in-person solutions.

TMP Government. *TMP's Top Ten Brainstorming Tips*. 2009.

TMP Government has released its top ten tips for successful brainstorming sessions. Based on years of experience, these tips can help any brainstorming session create optimal results.

Kaye, Beverly and Sharon Jordan. *Love 'Em or Lose 'Em: Getting Good People to Stay*. San Francisco: Berrett-Koehler Publishers, Inc., 2008.

This guide for managers offers strategies for retaining top employees. Each of the 26 alphabetized chapters tackles an aspect of keeping the best employees and uses anecdotes and exercises to explain how to handle issues ranging from family-friendly policies to learning more from exit interviews.

ABOUT THE BEST PLACES TO WORK IN THE FEDERAL GOVERNMENT GUIDE DEVELOPERS

About the Partnership for Public Service

The Partnership for Public Service is a nonpartisan, non-profit organization that works to revitalize the federal government by inspiring a new generation to serve and by transforming the way government works.

The Partnership:

- Raises awareness and helps improve public attitudes about government service.
- Promotes government service through outreach to college campuses and jobseekers.
- Provides hands-on assistance to federal agencies to improve their operations.
- Advocates for needed legislative and regulatory reforms to strengthen the civil service.
- Generates thought-provoking research on, and effective responses to, the workforce challenges facing the federal government.

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TMP Government is a wholly owned subsidiary of TMP Worldwide Advertising & Communications, the world's largest independent recruitment advertising agency. Within its McLean, Virginia headquarters, they develop and implement digital and traditional recruitment and outreach communications programs for government and those organizations working with government.

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