

Job Aid: Direct Caregiver Survey Provider Results

The intent of this job aid is to provide your agency with recommendations for engaging your Caregiver staff in creating the type of workforce everyone would like to be a part of. The goal is to integrate Caregiver satisfaction and engagement into the fabric and culture of our daily work. The following is recommended as an approach for engaging in this process.

The Process

- Manager to review agency survey results and share with staff. Your results are attached as *Provider Summary Table*. To note, PHI only ran analysis for providers that had five or more responses to protect staff anonymity.

Preparation

- First, do a self-assessment – how are you reacting to/feeling about your results?
- What are the patterns you are seeing in your data? Are there certain categories that are high or low?
- Identify the top strengths and opportunities as called out by PHI in your report.
- Determine how you will share the report with your staff (i.e. email, distribute copies, post on bulletin boards, etc.). This will depend on different variables, such as size of staff, shift or non-shift, etc. Do what makes the best sense for your area but do make sure the report gets shared.
- Prepare for meeting with your staff to solicit their input on enhancing satisfaction and engagement (see facilitation guidelines below).

| Logistical Considerations for Group Sessions | Facilitation Tips |
|---|--|
| <ul style="list-style-type: none">• Create an outline of the process you will follow and review it with your organization’s leadership team, colleagues in similar positions, and those working directly with members• Keep sessions small, if possible (15-20 employees are ideal)• All employees are welcome regardless of whether they completed the survey or not• Average session time: 30 – 45 minutes• Utilize the medium that fits the needs of your organization (i.e. virtual, in person, blended etc.) | <ul style="list-style-type: none">• Establish expectations and ground rules for the discussion• Act and speak with neutrality• Help the group build solutions together• Express optimism• Promote a creative, and relaxed atmosphere• Engage in active listening (taking notes, paraphrasing, and eye contact support this)• Be aware of body language and facial expressions• Validate thoughts and feelings• Encourage participation |

Process to Facilitate Group Feedback Sessions

1. **State** goal of session (e.g. “To create the work environment all of us want to be a part of and are proud of.”) Your goal as a manager is to learn as much as possible about how people are seeing things and why. Be curious and an investigative reporter, not a defender of the status quo.
2. **Thank** staff for participating in the survey and providing honest feedback about their experience working as a Caregiver.
3. **Ask** staff about their reaction to the results (excited, concerned, etc.). Don’t push this too hard. If people share, great, if not, that’s ok and move on to next step.
4. **Frame** as circle of influence and concern, that is, there are certain things all of you can directly influence (which is where you want to direct your energy) and other areas that are outside your circle of influence (which should still be identified and shared with senior leadership).
5. **Ask** “What are we already doing well that we need to keep doing?” (Prompt with top 5 strengths if necessary). Ask: “What needs to be changed, improved, or enhanced that helps us meet our goal of creating the work environment we all want?” (Prompt with top 5 opportunities to improve if necessary).

| Top 5 Strengths | Top 5 Opportunities |
|-----------------|---------------------|
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |
| 4. | 4. |
| 5. | 5. |

6. **Capture** responses – do not comment on ideas; just record them! Demonstrate understanding of issues.
7. **Ask** “Of the things listed, what could be changed or improved in a week? A month? Three months? What would need organizational/senior leadership support?” Record responses – this will help you fill out your action plan.
8. **Plan** if you have a 30, 60, 90 days action plan or workforce development plan, incorporate these new goals into that plan; if not create a 90 day/annual action plan on survey results and group sessions using the template below; share back with your staff (for validation).
9. **Implement** action plan.
 - Track progress; evaluate and re-evaluate action plan for progress.
 - Conduct regular check-ins to monitor progress.
 - Stay connected; incorporate into your staff meetings; stay engaged with your Caregivers; remember, do not make this a one-time event! Be consistent.

Follow-up

After conducting your feedback session, meet with your leadership and debrief how it went; the following process is recommended. Specifically address three questions:

1. What went well?
2. What barriers or challenges did you encounter?
3. What would you do differently next time?

Below is a template to follow to implement these steps.

| Action | Due Dates/Action Owner |
|--|------------------------|
| Survey Results are Shared with Leadership | |
| Survey Results are Shared with All Staff | |
| Action Plan Created or Incorporated into Existing Plan | |
| Action Plan Reviewed by Leadership | |
| Follow up on Implementation Action Plan | |

Workforce Development Best Practices to Consider for Goal Development

- All levels of the organization need to be involved
- Programs/goals must become a part of a company culture of continuous learning
- Periodic check-ins to evaluate progress made toward goals
- Adjust goals as needed to meet identified outcomes
- Utilize SMART Goals, Definitions and Examples ([click here](#))

Action Plan Template (*full template attached)

| Agency Name: | | | | | | |
|--------------|----------------------------|---------|----------------------------|---------|----------------------------|---------|
| Date: | | | | | | |
| Goal | __Days (Insert time frame) | | __Days (Insert time frame) | | __Days (Insert time frame) | |
| | Action Steps | Results | Action Steps | Results | Action Steps | Results |
| | | | | | | |
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