



ENGAGEMENT AMBASSADOR ACTION PLANNING SUMMIT 2025

Facilitating Team Action Planning

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May 20, 2025

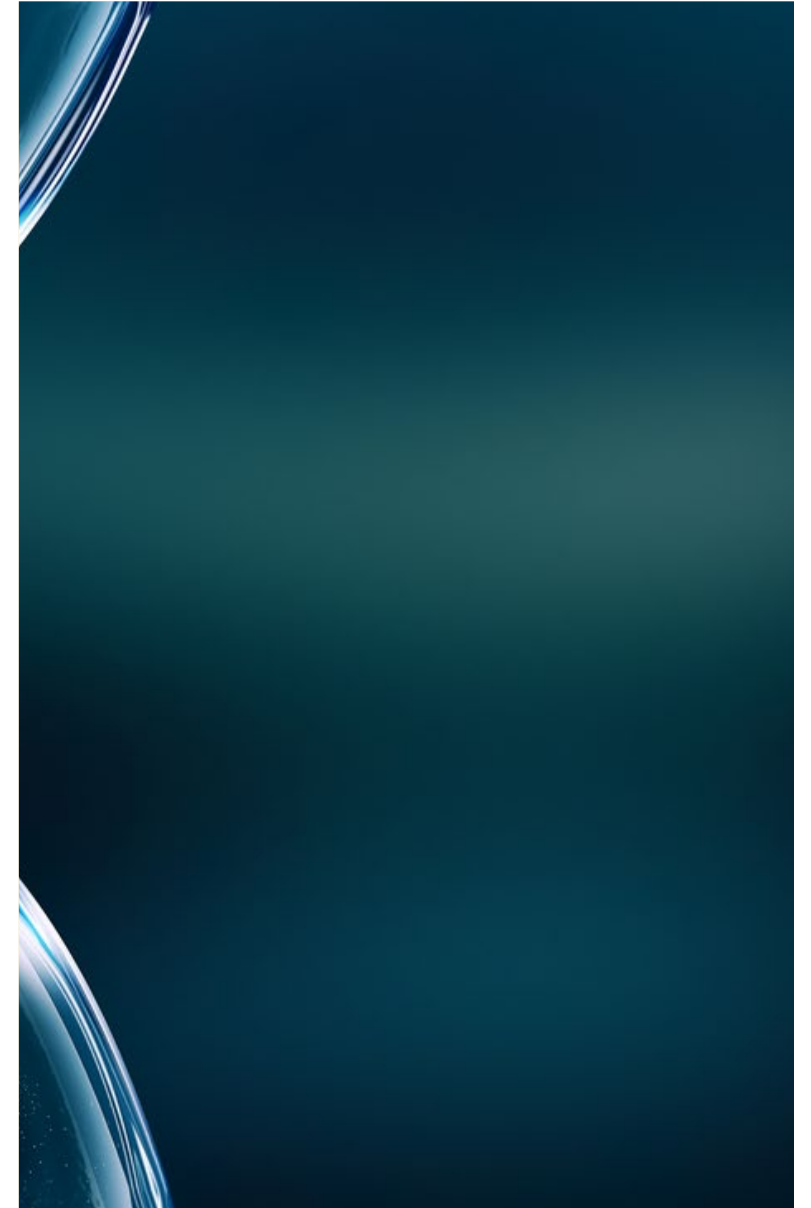
WHAT WE'LL COVER

Participation & High Level Results

Why Action Plan

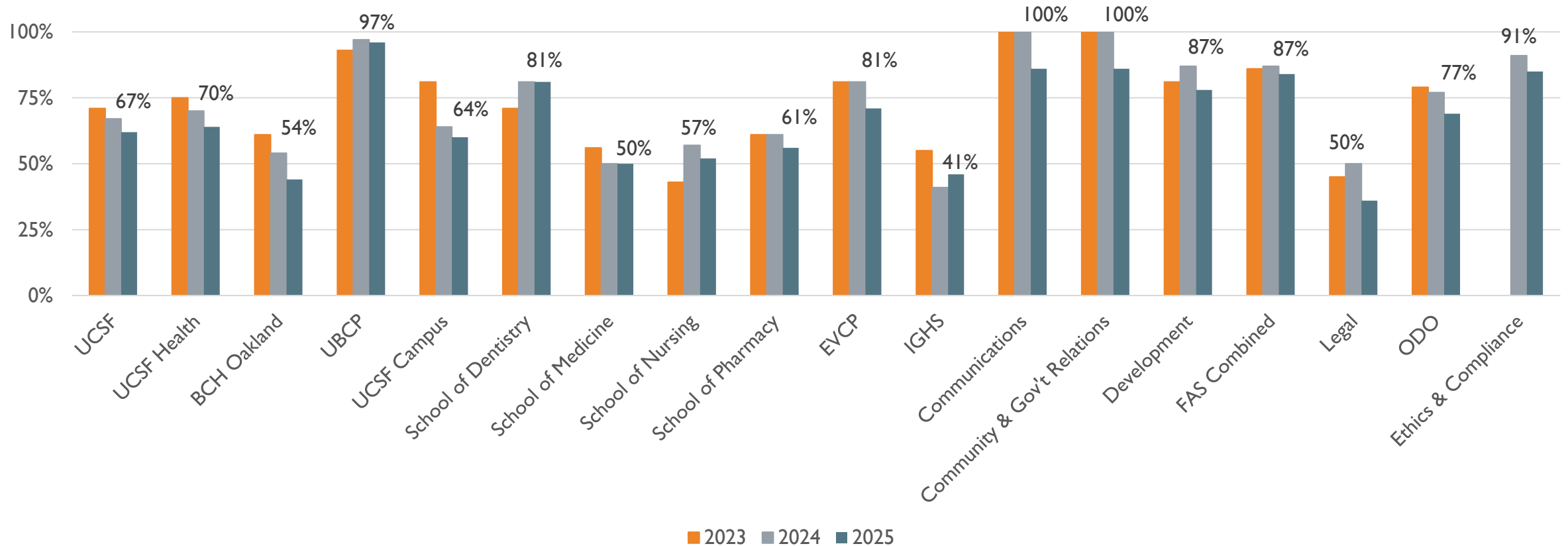
Action Planning Resources

Your Next Steps



THANK YOU, AMBASSADORS!

2023 & 2024 Final Engagement Survey Participation Rates





2025 SES SUMMARY

Metric	2025 UCSF Overall Score	YOY Change
Engagement Mean Grand Mean & Q12 Mean	3.91	-.03
Accountability Index	3.70	-.06
Belonging Index	3.79	-.03
Culture of Patient Safety	3.66	0.00

Most survey items are scored from 1-5 on a Likert scale where 5 = Strongly Agree and 1 = Strongly Disagree



The diagram features three concentric circles. The innermost circle is white and contains the title 'TEAM ENGAGEMENT' in orange, followed by a definition in grey. The middle ring is light grey and contains five terms: 'Q¹² Mean' at the top, 'Accountability' at the top-right, 'Patient Experience' at the bottom-right, 'Belonging' at the bottom, and 'Culture of Safety' at the top-left. The outermost ring is a slightly darker shade of grey.

Q¹² Mean

Culture of Safety

Accountability

TEAM ENGAGEMENT

The shared feelings of people
who are invested in their own
success and the success of those
around them

Retention & Wellness

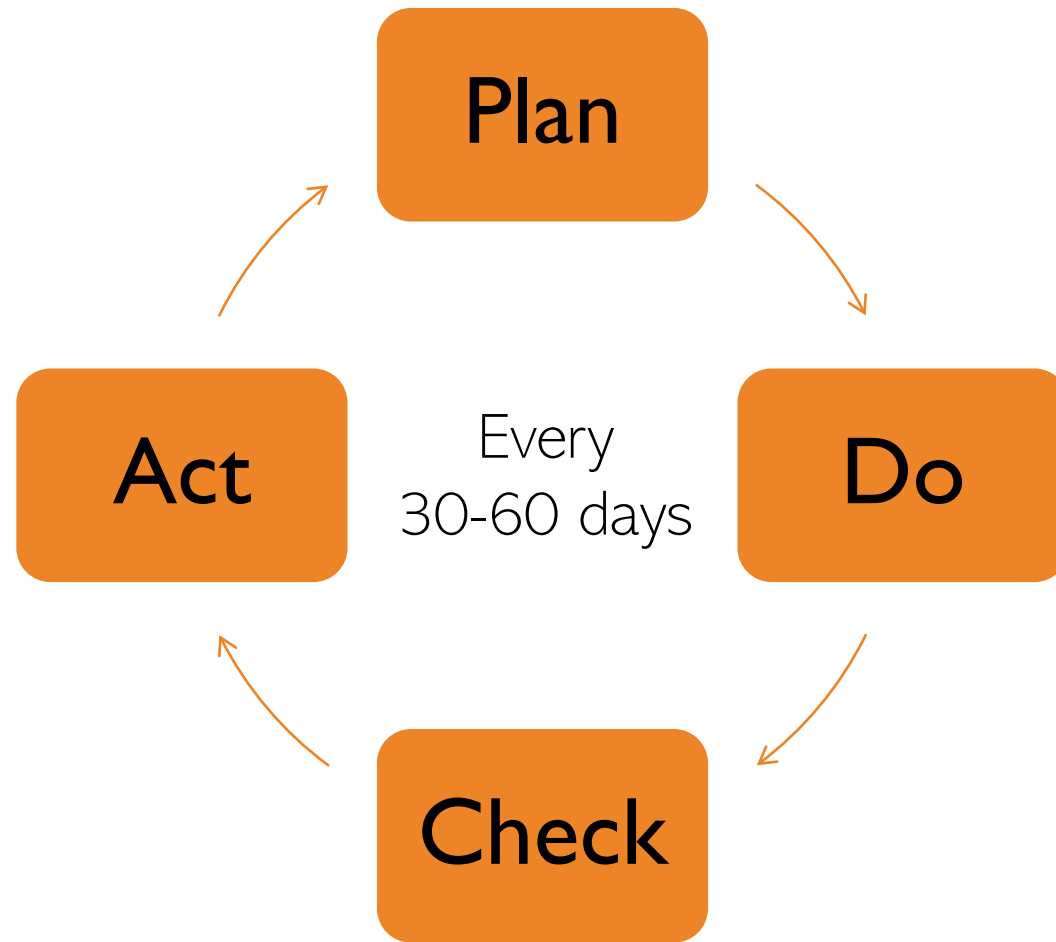
Patient Experience

Belonging



Engagement Action Planning

- Sparks positive change
- Encourages teams to discuss their strengths and opportunities for engagement
- Empowers teams to commit to meaningful actions
- Fosters a work environment where people feel invested in their own success and in each other's



A CONTINUOUS CYCLE



GETTING READY

MANAGER LEADS, AMBASSADOR SUPPORTED



GETTING READY

Guidance for People Managers

1. Review last year's engagement action plans—including goals, tactics, and outcomes.
2. Review your team's Gallup results at [Gallup Access](#).
3. Identify key insights:
 - What has improved since last year?
 - What declined?
 - How do results align with last year's engagement action planning goals?
 - What themes stand out in open-ended comments?
4. Choose key insights to share with your team.
5. Meet with your Engagement Ambassador.
 - Schedule two meetings, at least one week apart.
 - Choose your preferred format: in-person or online.
 - Decide on report format: digital or print.



RESULTS SHARING: MEETING I

MANAGER LEADS, AMBASSADOR SUPPORTED





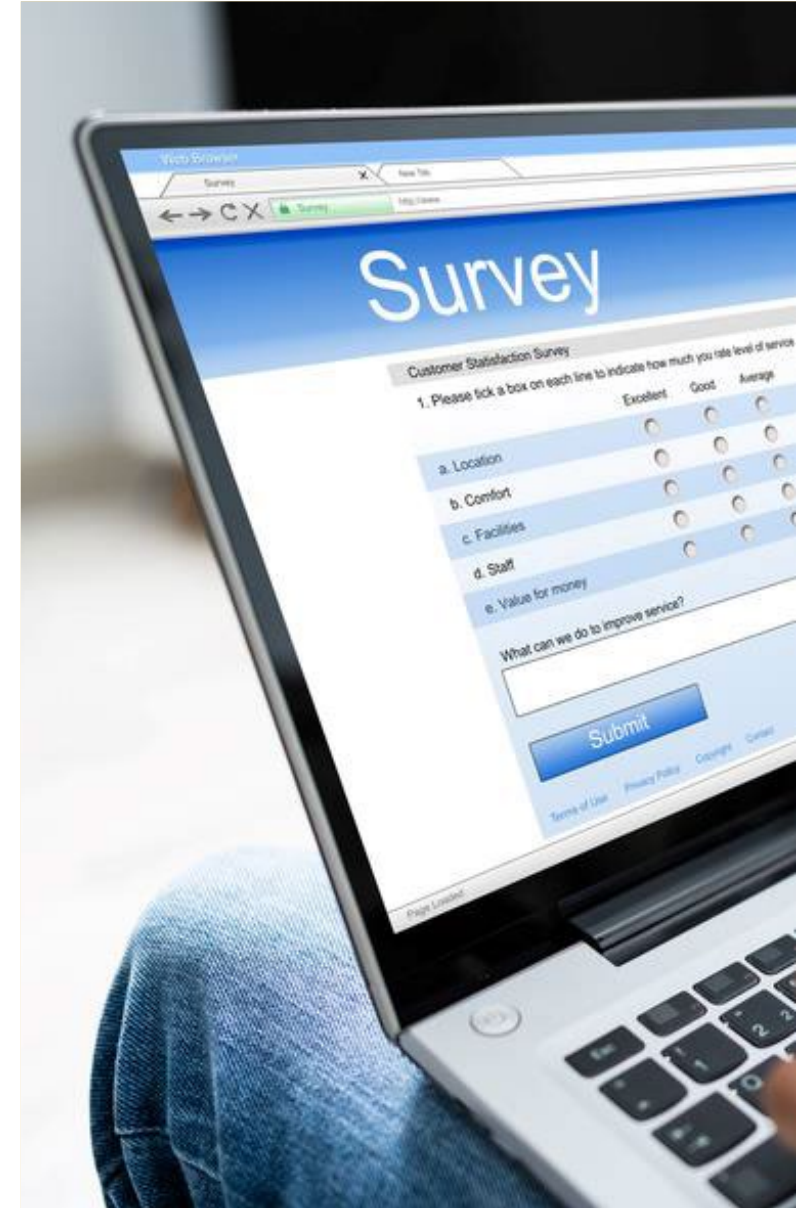
TEAM ENGAGEMENT

Meeting 1: Manager Shares Results



PURPOSE

- To share the results of the staff engagement survey
- To describe next steps





Team engagement refers to the shared feelings of people who are invested in their own success and the success of those around them.



REFLECT ON THE PAST 12 MONTHS

Biggest Wins

List 2-3 major accomplishments.

Key Milestones

What moments marked important progress or change for our team?

Challenges Overcome

What were 1-2 hurdles, and how did we manage them?

Team Highlights

What are you most proud of about our team's growth and development?



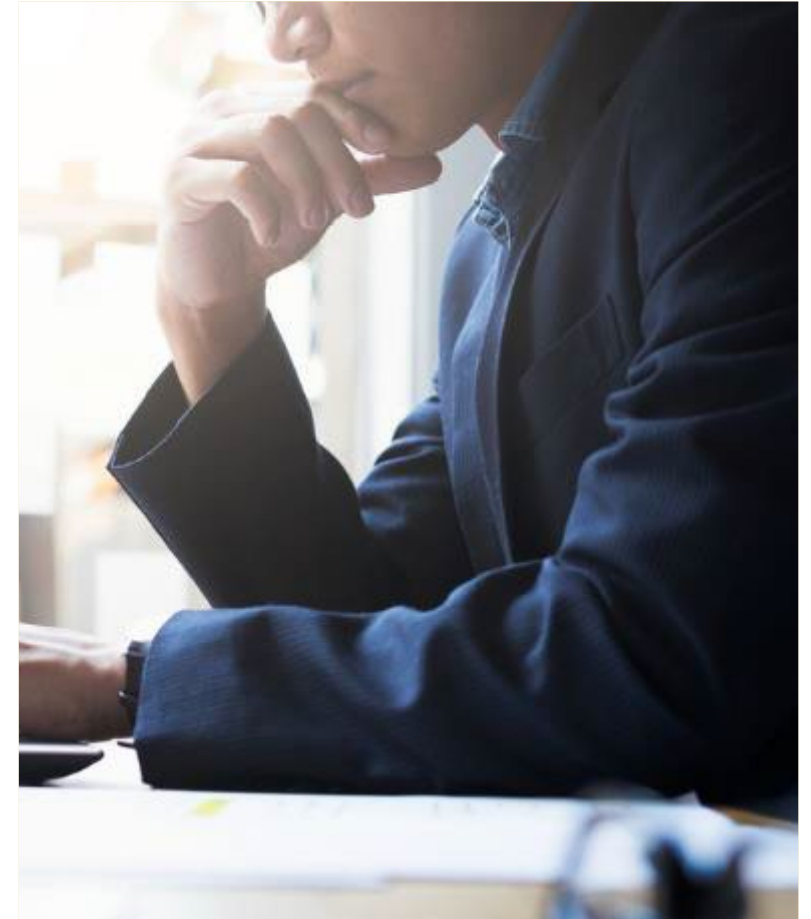
Our Annual Staff Engagement Results

Go to [UCSF.MY.GALLUP.COM](https://ucsf.my.gallup.com).

Q¹² Mean | Accountability | Patient Experience | Belonging | Retention & Wellness | Culture of Safety

NEXT STEPS

- Consider our results individually
- Develop an action plan together on [INSERT DATE]





ACTION PLANNING: MEETING 2

MANAGER LEADS, AMBASSADOR SUPPORTED

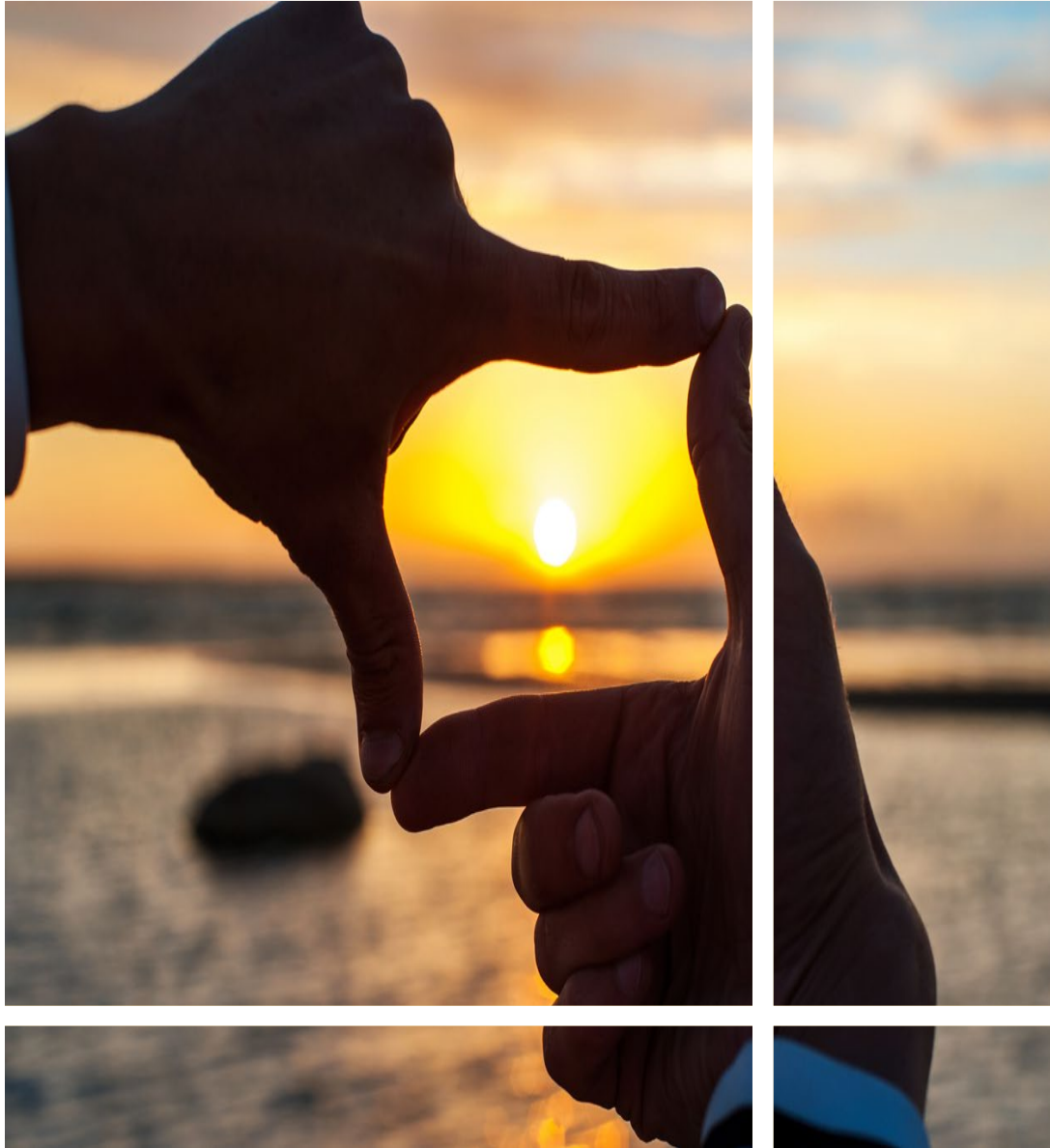




TEAM ENGAGEMENT

Meeting 2: Team Plans Actions





PURPOSE

To identify ONE issue to address within the next 30-60 days

GROUP INTENTIONS

- Listen openly and with curiosity
- Engage fully—everyone participates
- The team owns both the goal and the actions
- Anything else?





ABOUT THE RESULTS

Looking at your team's results, what stands out most to you?

- What are we doing well?
- Where could we improve?
- Is there anything else you'd like to highlight?



Starts with Current State

Planning begins with an honest look at where we are now.

Team-Driven Improvement

Focused on enhancing our work experience to achieve goals and stay engaged.

WHAT IS ACTION PLANNING?

Owned by the Team

Everyone contributes, and the team is responsible for executing the plan.

Enabled by Managers

Managers don't own the plan. They create the space and show support for ongoing action.



Find the **Issue**

1. List all the **issues** that make it hard for this group to reach its goals (45 seconds)
2. **Check** the ones the team can influence, even if they may not fully be under the team's control.
3. **Circle one** checked issue the team could realistically work on in the next 30-60 days, even if it won't be fully solved. (10 seconds)
4. **Share** your thoughts in your breakout group.



SMALL GROUP ACTIVITY I

What issue should we
focus on?

In Breakout Groups of 3-5 people; 10 minutes

1. Choose a spokesperson for your group.
2. Each person shares one issue and why they chose it. *(You're selecting an issue, not solving it yet.)*
3. Vote on one issue the group wants to prioritize.
4. Spokesperson presents the chosen issue and reason to the larger group.



TEAM VOTES ON ONE ISSUE TO FOCUS ON

Group 1	Group 2	Group 3	Group 4
Issue A	Issue B	Issue C	Issue D

EXAMPLE: TEAM VOTES ON ONE ISSUE TO FOCUS ON

Group 1	Group 2	Group 3	Group 4
Ineffective team meetings	Lack of cross-training	We work in silos	Lack of professional growth opportunities



Find the Action

1. List all the actions you could take to improve this issue in the next 30-60 days. (2 minutes)
2. Circle your top idea from the list. (10 seconds)
3. Share your idea with your breakout group.



SMALL GROUP ACTIVITY 2

Given the issue, what action should we focus on?

In Breakout Groups of 3-5 people; 15 minutes

1. Choose a new spokesperson for your group.
2. Each person shares their action idea and why they chose it.
3. Vote on one action the group wants to prioritize.
4. Spokesperson presents the chosen action and reason to the larger group.

EXAMPLE: TEAM VOTES ON ONE ACTION TO FOCUS ON

Group 1	Group 2	Group 3	Group 4
Attend Lunch and Learns	Set aside 2 hours each month for back office and Apex teams to learn each other's workflows	Train team member in necessary skills before they cover for planned vacations or leaves	Join optional peer-led sessions to exchange tips and best practices

CONNECT THE ACTION TO THE SURVEY

A CONTINUOUS CYCLE



NEXT STEPS

- Manager enters the Engagement Action Plan in HR Umbrella
- Manager holds regular check-ins to discuss engagement progress
- Team restarts the process when actions are complete



PROCESS CHECKLIST



Process Checklist

Use this process checklist to prepare and hold team engagement action planning sessions.

Getting Ready

1. Review last year's engagement action plan—including goals, tactics, and outcomes.
2. Review your team's Gallup results at [Gallup Access](#).
3. Identify key insights:
 - o What has improved since last year?
 - o What declined?
 - o How do results align with last year's engagement action planning goals?
 - o What themes stand out in open-ended comments?
4. Choose key insights to share with your team.
5. Meet with your Engagement Ambassador.
 - o Schedule two meetings, at least one week apart.
 - o Choose your preferred format: in-person or online.
 - o Decide on report format: digital or print.

Meeting 1: Manager Shares Results

1. Thank the team for completing the survey and sharing their insights.
2. Distribute the team engagement results.
3. Share your prepared observations.
4. Set expectations for action planning.



Meeting 2: Team Plans Actions

Open the discussion: Looking at the survey results, what stands out most to you?

WHO	STEP 1: FIND THE ISSUE	STEP 2: FIND THE ACTION
Individual	1. List all the issues that make it hard for this group to reach its goals (45 seconds) 2. Check the ones the team can influence, even if they may not fully be under the team's control. 3. Circle one checked issue the team could realistically work on in the next 30-60 days, even if it won't be fully solved.(10 seconds) 4. Share your thoughts in your breakout group.	1. List all the actions you could take to improve this issue in the next 30-60 days. (2 minutes) 2. Circle the top idea from the list. (10 seconds) 3. Share your idea in your breakout group.
Small Group	5. Choose a spokesperson for your group. 6. Each person shares one issue and why they chose it. (You're selecting an issue, not solving it yet.) 7. Vote on one issue the group wants to prioritize. 8. Spokesperson presents the chosen issue and reason to the larger group.	4. Choose a new spokesperson for your group. 5. Each person shares their action idea and why they chose it. 6. Vote on one action the group wants to prioritize. 7. Spokesperson presents the chosen action and reason to the larger group.
Team	9. Vote on one issue to focus on.	8. Vote on one issue to focus on. 9. Connect the action to the survey.

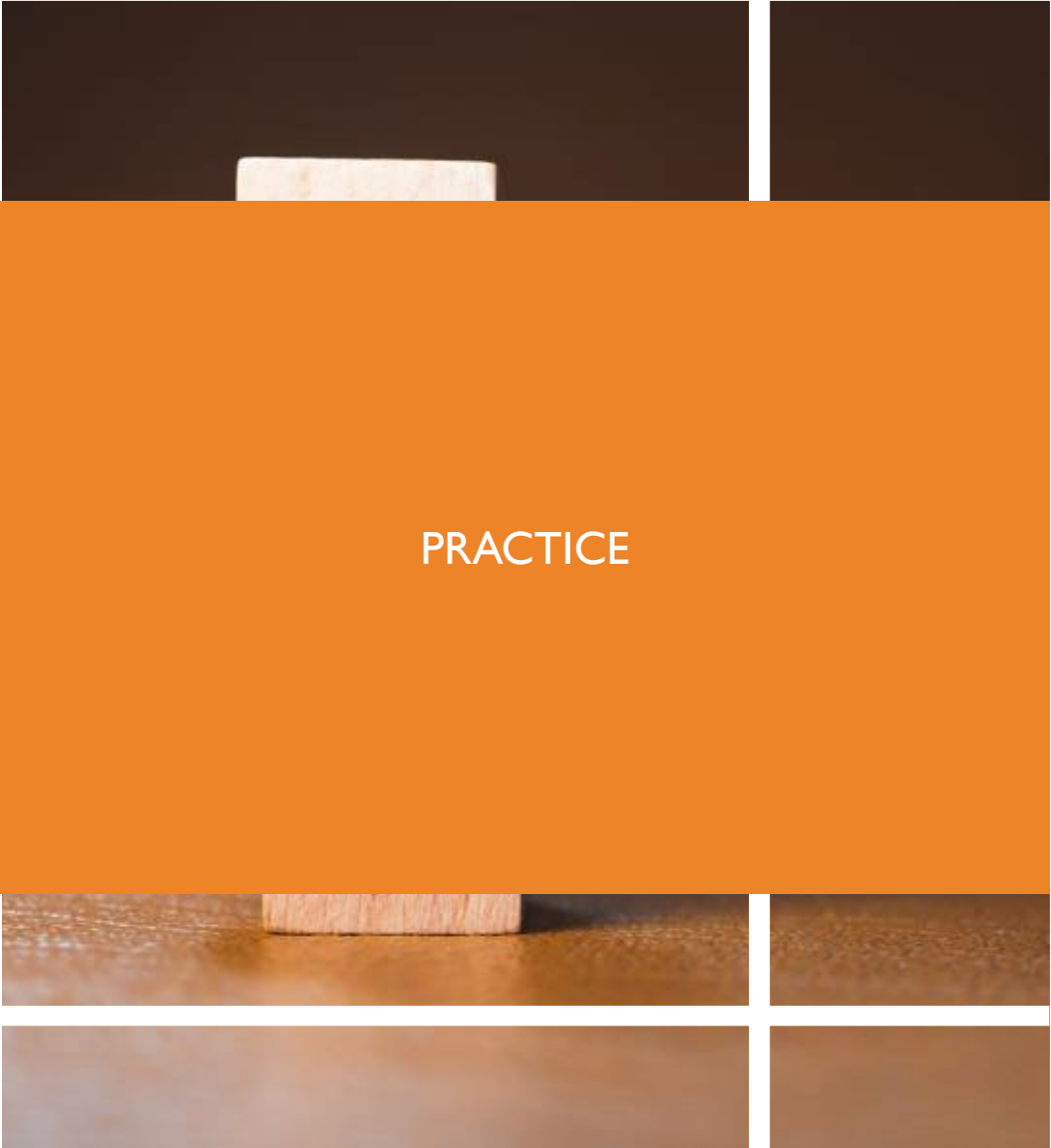
Next Steps

1. **Enter the Engagement Action Plan** in HR Umbrella.
2. **Hold regular check-ins** to discuss engagement progress.
3. **Restart the process** when actions are complete.



NOW WE
PRACTICE

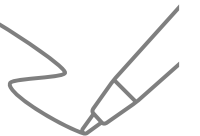


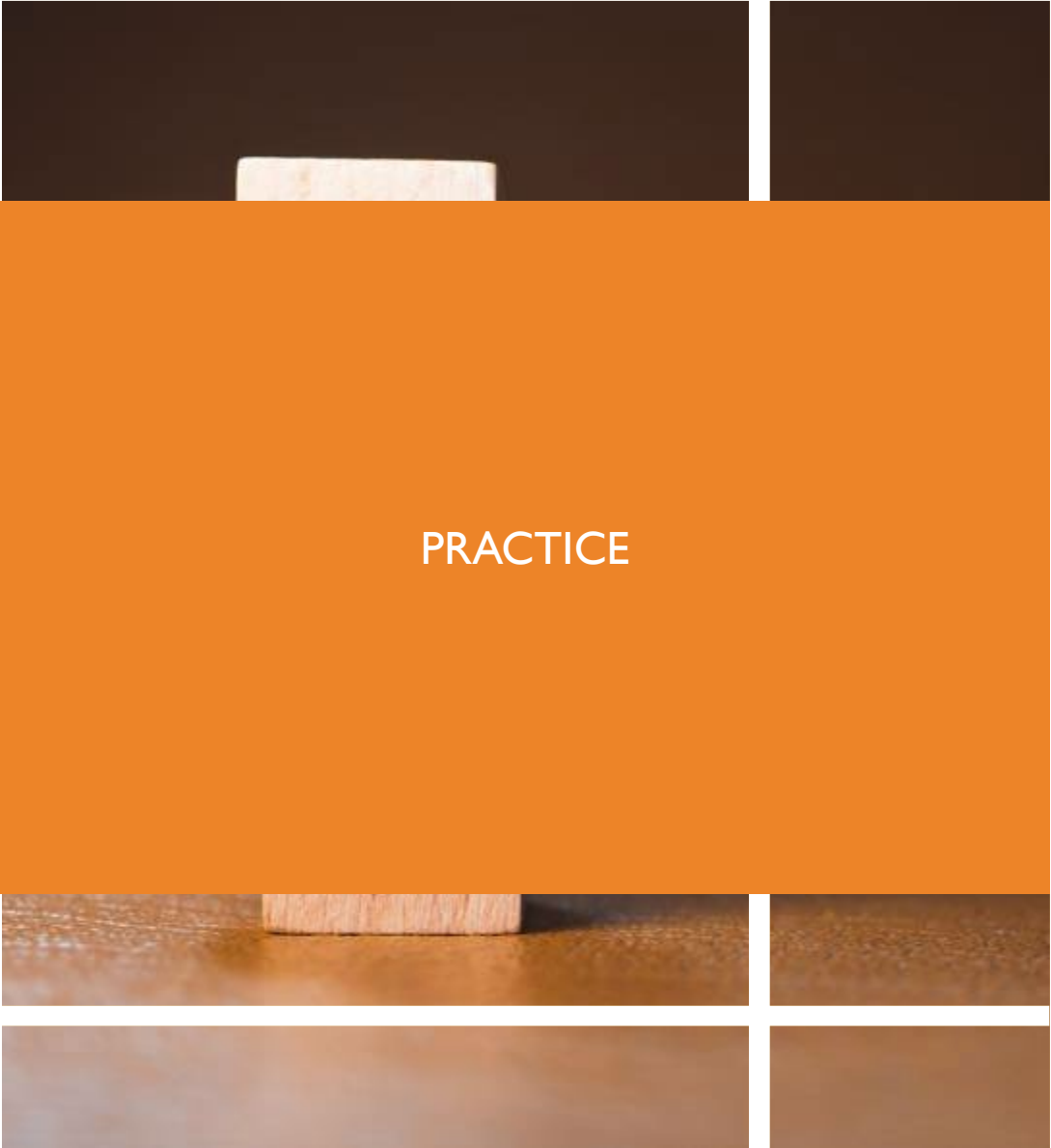


PRACTICE

Find the **Issue**

1. List the **barriers** that hinder your partnership with your manager in supporting the team's action planning and explain why. (45 seconds)
2. **Select** the issues you can influence to help the team become more engaged in action planning.
3. **Circle one** checked issue you could make progress on in the next 30 days, even if it won't be fully resolved. (10 seconds)

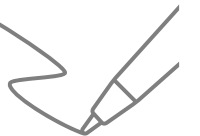




PRACTICE

Find the **Action**

1. List all **actions** you could take to improve this issue in the next 30 days. (2 minutes)
2. Circle your **top idea** from the list. (10 seconds)
3. Share your **idea** in your breakout group.
4. Listen for **action words**—what is each Ambassador committing to do?



PRACTICE

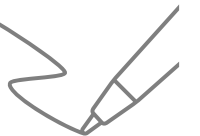


SMALL GROUP ACTIVITY 2

Given the issue, what
action will you focus on?

2. Each person shares their action idea and why they chose it.

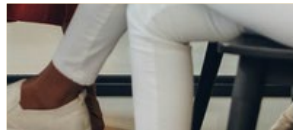
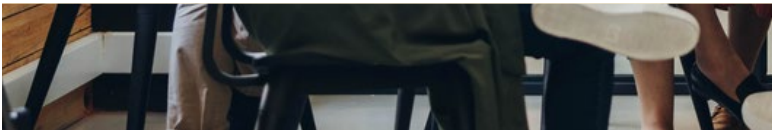
In Breakout Groups of 3-5 people; 5 minutes



ACTION PLANNING

- Inclusive, structured process
- Repeatable, flexible, and adaptable
- Focused on what the team can influence or control





YOUR RESOURCES & NEXT STEPS

- Review “Engagement Action Planning for Teams”
Resources available in the UC Learning Center: guide, checklists, and slides for Meetings 1 and 2
- Connect with your manager(s)
- Join Action Planning Office Hours