

# Writing Improvement Plans

## Using the S.M.A.R.T Goal Methodology

Each Improvement Plan should include a clearly defined issue that the team is facing, a goal for improving upon that issue – including a clear picture of what success in accomplishing the goal looks like, and a set of steps (tasks) that will be taken to achieve the goal.

### What Does a Good Improvement Plan Look Like?

<b><u>S</u>pecific</b>	Clear, focused and targeted toward the root issue - requires understanding. Understanding ensures we are working on the right issue.
<b><u>M</u>easurable</b>	How will we track progress and know when a goal is met? Without measurement, we won't know if we are successful.
<b><u>A</u>ccountable</b>	Clearly identify who will be responsible for completing each step. Accountability ensures action.
<b><u>R</u>ealistic</b>	Is this plan possible given the current changes, resources, and timeline? Realistic goals help maintain motivation.
<b><u>T</u>ime-Driven</b>	By when should this goal be completed? Without timing, there is no commitment.

Remember to use the S.M.A.R.T. method when completing each section of the Improvement Plan form:

#### 1) Issue

- Understand the root cause of what's going on. Ask the team - why are you feeling this way about this topic? What isn't working well? Why are things not working well? What are some examples?
- Ask yourself - What were the comments and feedback that made this topic an area of focus for the team?
- Be as specific as possible when describing the issue.

#### 2) Goal

- Ask yourself – what do you want to accomplish? What/who does this impact?
  - Example 1: Improve recognition for teammates so they feel valued when they go above and beyond.
  - Example 2: Improve communication – specifically between managers and employees, so employees feels “in the know” in a timely manner and can anticipate changes.
- The Goal section should simply and clearly state the goal(s) of the plan.
- You will outline **how** the team will accomplish these goals in the Tasks section.

#### 3) Tasks

- Each task should describe a tactic that will be used to reach the goal.
- Tasks should include the following:
  - Specific timing and/or cadence of the tactic
  - Who “owns” or who is accountable for the completion of that tactic
  - Due date – when that task should be completed

#### 4) Success Measure

- Have a specific success measure for each task.
- Ask yourself –What do we want it to look like and feel like to be a member of this team when we've reached our goal? What will need to change to accomplish this? How will we know if the goal is achieved?
- Tie success to both behaviors and metrics (Engagement score and/or scores of an item).

### 5) Progress Update

- Set a standard cadence to review progress of the improvement plan(s) with the team. Best practice is to review at least quarterly.
- Ask yourself and the team –What has been accomplished? What still needs to be completed? What has been going well? What could be better? Do we need to make changes to these plans to successfully reach our goal(s)?
- Make changes to the plan as needed and continue to include employees in the process.

## Improvement Plan Examples

Use the two examples below to help identify a vague, ineffective plan vs. a specific, time-bound, effective improvement plan. Effective plans will outline specific steps to be taken, clear ownership, and realistic time frames for completion.

### Less effective plan:

<b>Survey Item: I am involved in decisions that affect my work.</b>				
<b>Issue</b>	Employees don't feel involved in decision making.			
<b>Goal</b>	Include employees in decision making.			
<b>Success Measure</b>	Engagement score improves on 2019 survey.			
<b>Due Date</b>	End of year			
<b>Task(s)</b>	<b>Owner</b>	<b>Success Measure</b>	<b>Start Date</b>	<b>Due Date</b>
Do a better job at including teammates	Manager	Score improves.	1/31/2019	End of year

### More effective plan:

<b>Survey Item: I am involved in decisions that affect my work.</b>				
<b>Issue</b>	Employees identified concerns around management decisions being made regarding work flow and scheduling that did not adequately take into account employee needs/concerns.			
<b>Goal</b>	Provide a formalized channel for employees to provide feedback and input into decisions affecting work flow and scheduling, when appropriate.			
<b>Success Measure</b>	Employees report improvement on having input into workflow and scheduling, the survey item mean score is at or above the organizational average on the 2019 survey.			
<b>Due Date</b>	9/1/2019			
<b>Task(s)</b>	<b>Owner</b>	<b>Success Measure</b>	<b>Start Date</b>	<b>Due Date</b>
Create a Staff Council where peer-nominated employees can be included in work flow efficiency discussions. Decisions will be documented and provided out to all employees for review, with a window for feedback to be provided to the Council.	Team	Council is created by the end of the first quarter.	1/31/2019	3/30/2019
During bi-weekly meetings, a standing agenda item will be added, specifically for input and preferences on team schedules.	Manager	Teammate input is asked for and documented during bi-weekly meetings.	2/1/2019	9/1/2019
Manager will attend a training workshop on employee involvement - one which addresses how to achieve a management style that emphasizes team engagement and decision-making.	Manager	Manager completes training workshop by the next survey administration.	4/1/2019	9/1/2019