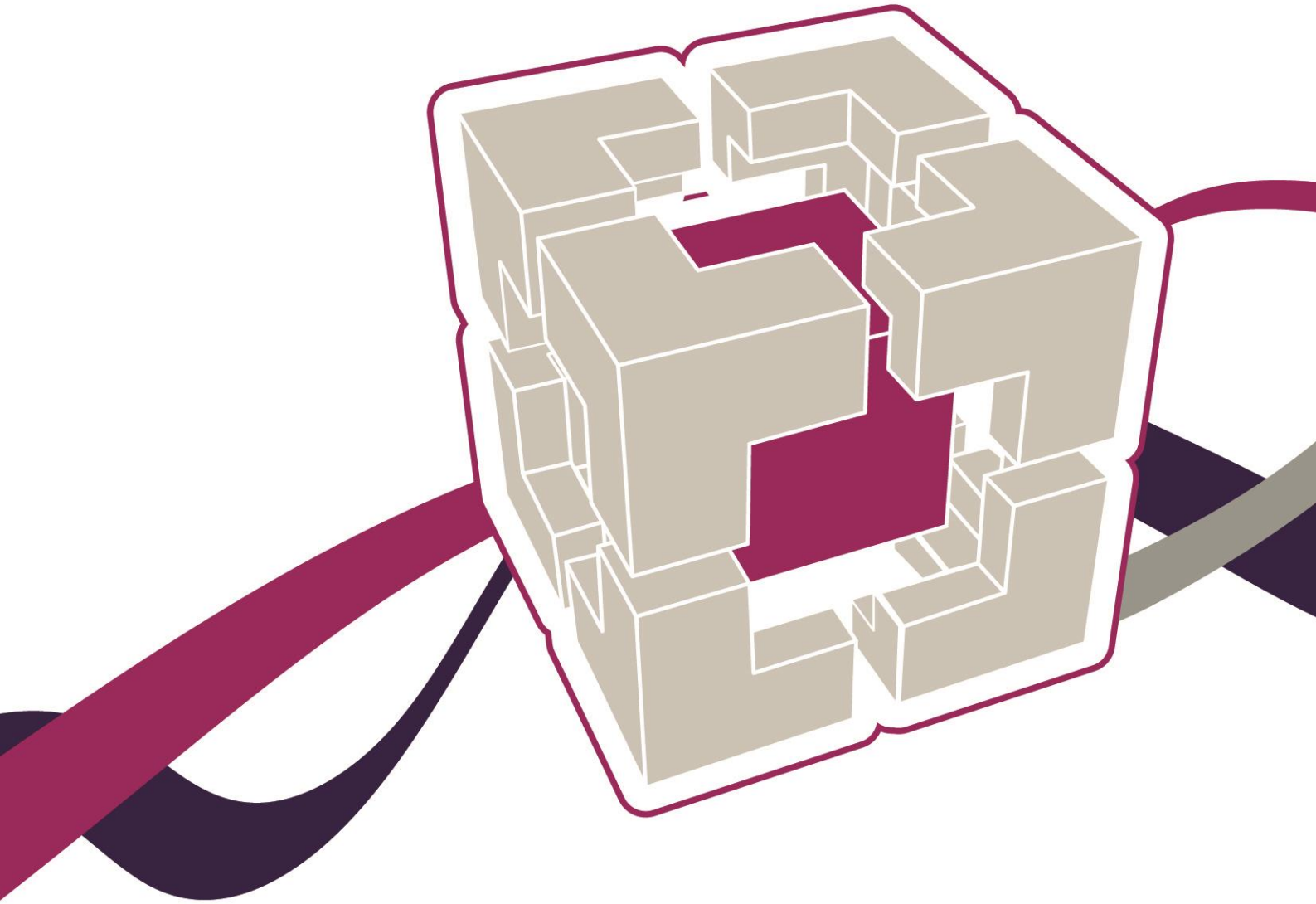
NHS
Leadership Academy

The Healthcare Leadership Model Appraisal Hub

360 Assessment User Guide



www.leadershipacademy.nhs.uk

360 Assessment User Guide

Contents

The Healthcare Leadership Model Appraisal Hub is an online, user friendly system for measuring and providing leaders in healthcare with feedback on their individual behaviour and performance

Introduction

What is the Healthcare Leadership Model Appraisal Hub?

- → The **Healthcare Leadership Model Appraisal Hub** is an online, user friendly system for measuring and providing leaders in healthcare with **feedback** on their individual **behaviour** and **performance**.
- → The hub enables you to complete a **questionnaire** based on the Healthcare Leadership Model that evaluates your **self-perception** of your leadership behaviour in the workplace.
- → Individuals who have chosen to participate in the **360 questionnaire** will also receive **feedback** from their **'raters'**; other people (Peers, Direct reports, Line manager, and others) whom they have invited to provide **observation** and **comment** on their leadership **performance** and **behaviour**.
- → The results are presented to you in a **report** which will be provided by an **accredited facilitator** as part of a **dedicated feedback session**.
- → The report will give you an indication of your current leadership **performance** and **behaviour** as seen by yourself in **comparison** with your raters.
- → Through exploration of the report with your facilitator, you will gain a real **insight** into your areas of **strengths** and **limitations** and begin to construct a **development plan** from which to enhance your effectiveness as a leader.
- → The information within the report is treated as **confidential** to you. However, you may wish to share the report with others, for example members of your **team**, a **coach** or someone else who can help you interpret the results – but that is completely your **own** choice.

Why am I being asked to complete this questionnaire?

- → The questionnaire provides an opportunity for you and the people you work with to **rate** your leadership behaviours within your work place. This will help you to **develop** and make **sustainable improvements** to your performance at work.
- → The questionnaire can be used to provide a **starting point for discussion** and **increased awareness** at an **individual**, **team** or **organisational** level.
- → The report can provide you with an **increased awareness** of both your **strengths** and **limitations** in the workplace. It can highlight areas where you may have **overestimated** your performance as well as areas you may have **neglected**.

What should I do if I have any technical difficulties?

Please contact the helpdesk on **+44 (0)1242 282 979** or email us: 360support@jcaglobal.com

Step 1.

Accessing the Healthcare Leadership Model Appraisal Hub

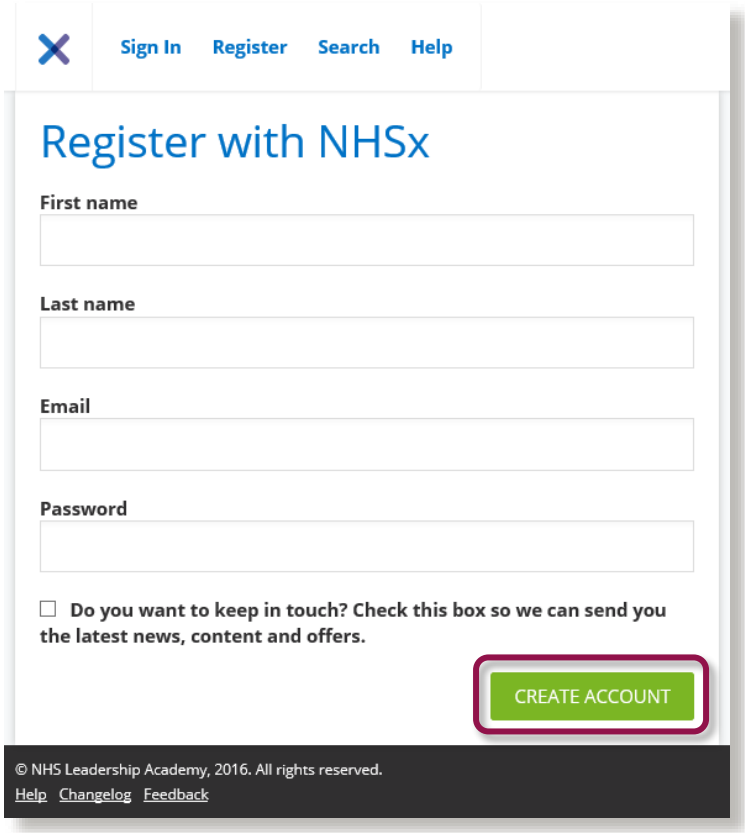
→ In order to create and begin a 360 assessment, you will need to access the Healthcare Leadership Model Appraisal Hub via the following link:

https://modelappraisalhub.leadershipacademy.nhs.uk/Account/Login

→ The link will take you to the **home page** of the Healthcare Leadership Model Appraisal Hub where you will be required to enter your username and password.

→ If you **do not** have a username and password you will need to create an account by clicking on the following link: https://nhsx.uk/register

→ Create an account using the **form** pictured below:

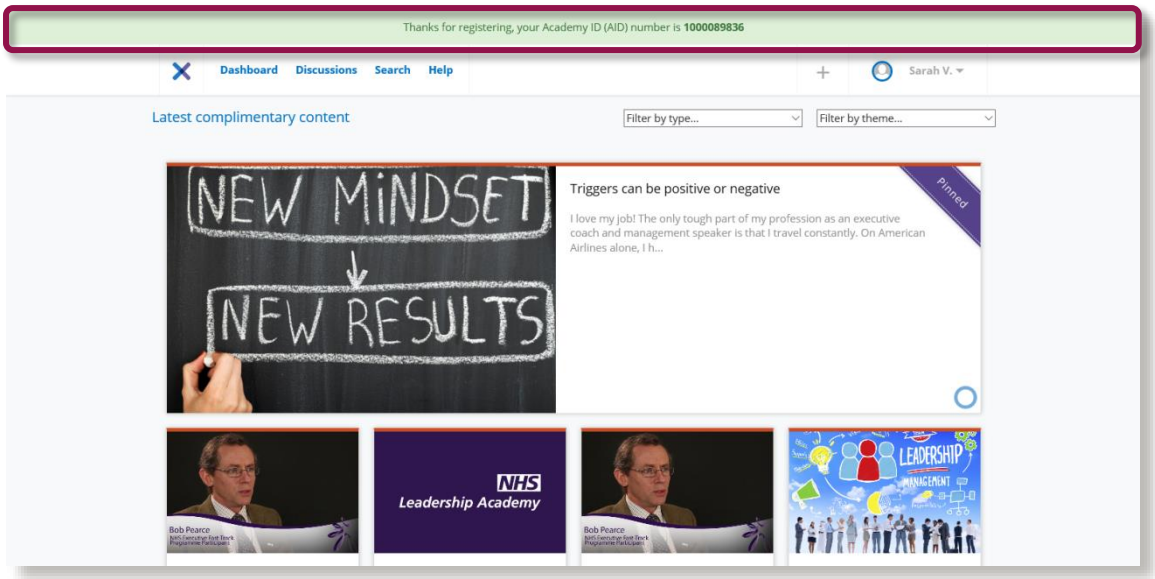


✓ *Note: if this page **does not** appear then you may **already** be logged into an NHSx account, in which case carry on from the instructions on page 5.*

→ You will receive an **email** to the address you specified when you created an account, containing your **10-digit username**.

→ Your **10-digit username** is also specified at the top of the page once you have clicked **Create Account** (see below)

✓ *Note: The screen shown below **may not** have the same '**Complimentary content**' as this is updated regularly.*

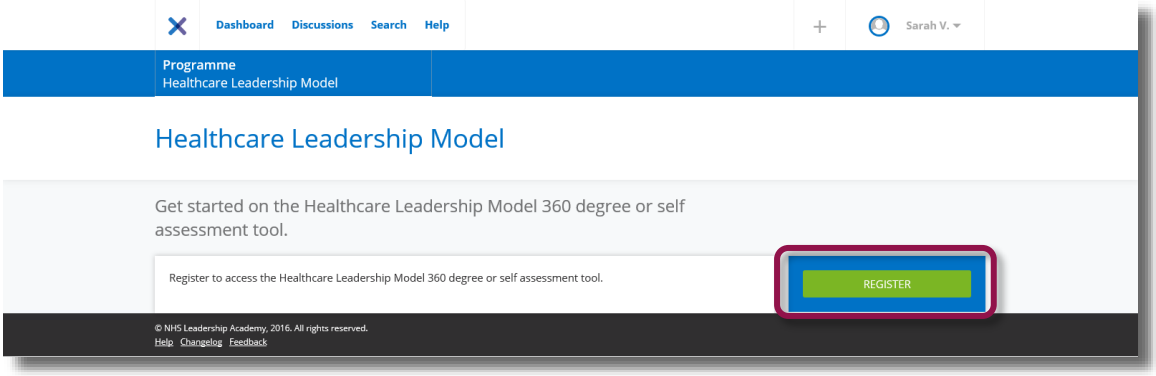


→ If you were already registered and logged in, click **Dashboard** at the top of the page and you will be taken to the screen shown above. If you have just created an account, you will already be at this page.

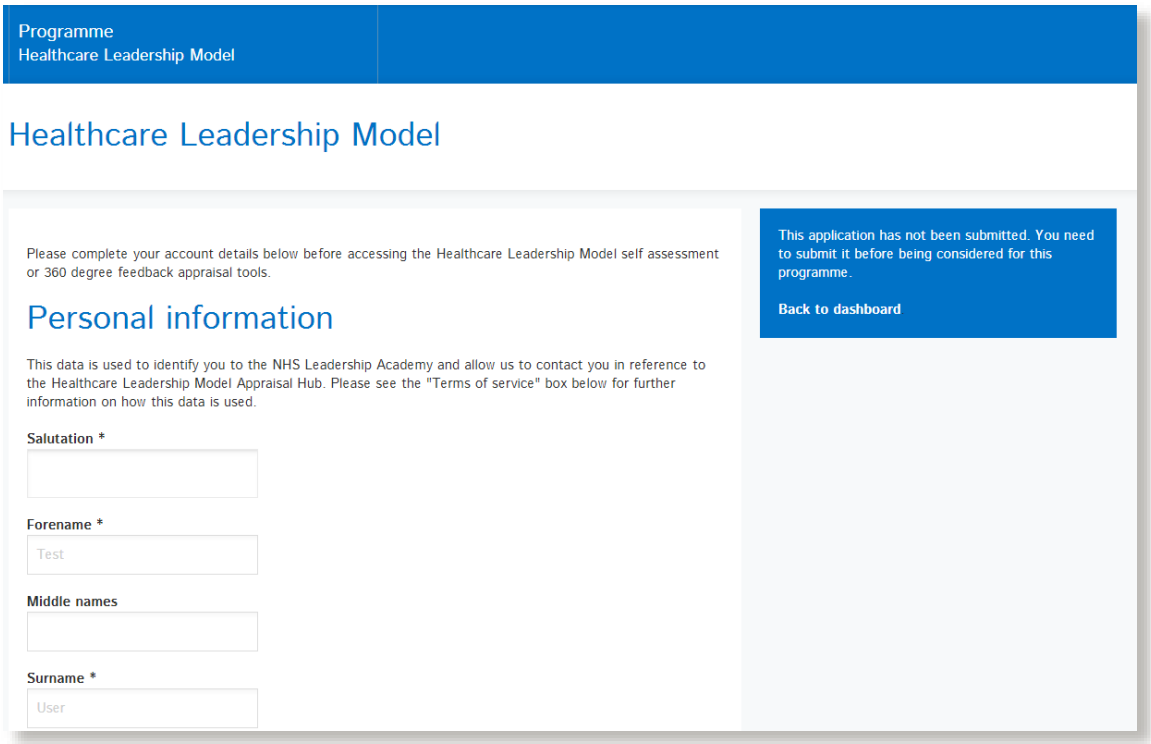
→ Whilst you are on this page, scroll until you reach the **Programmes** section.

→ You will see **Healthcare Leadership Model** under **All Programmes**. Click **Register** on this programme to complete your registration.

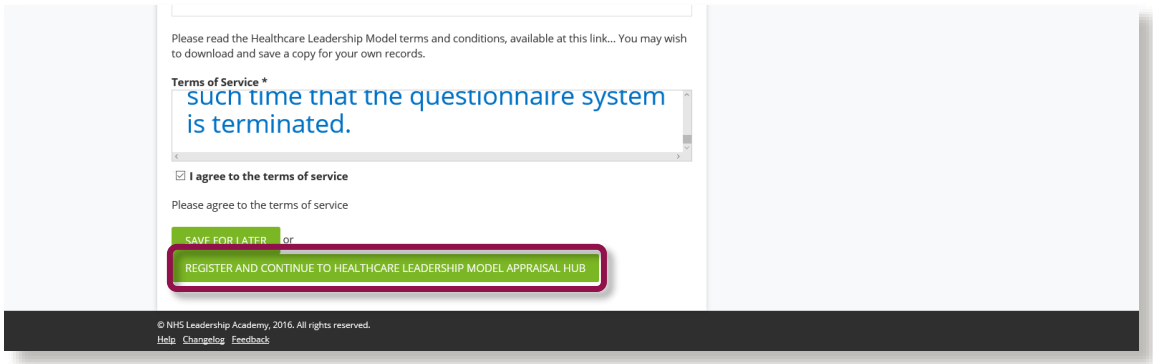
→ Press **Register** again to confirm that you would like to access the Healthcare Leadership Model



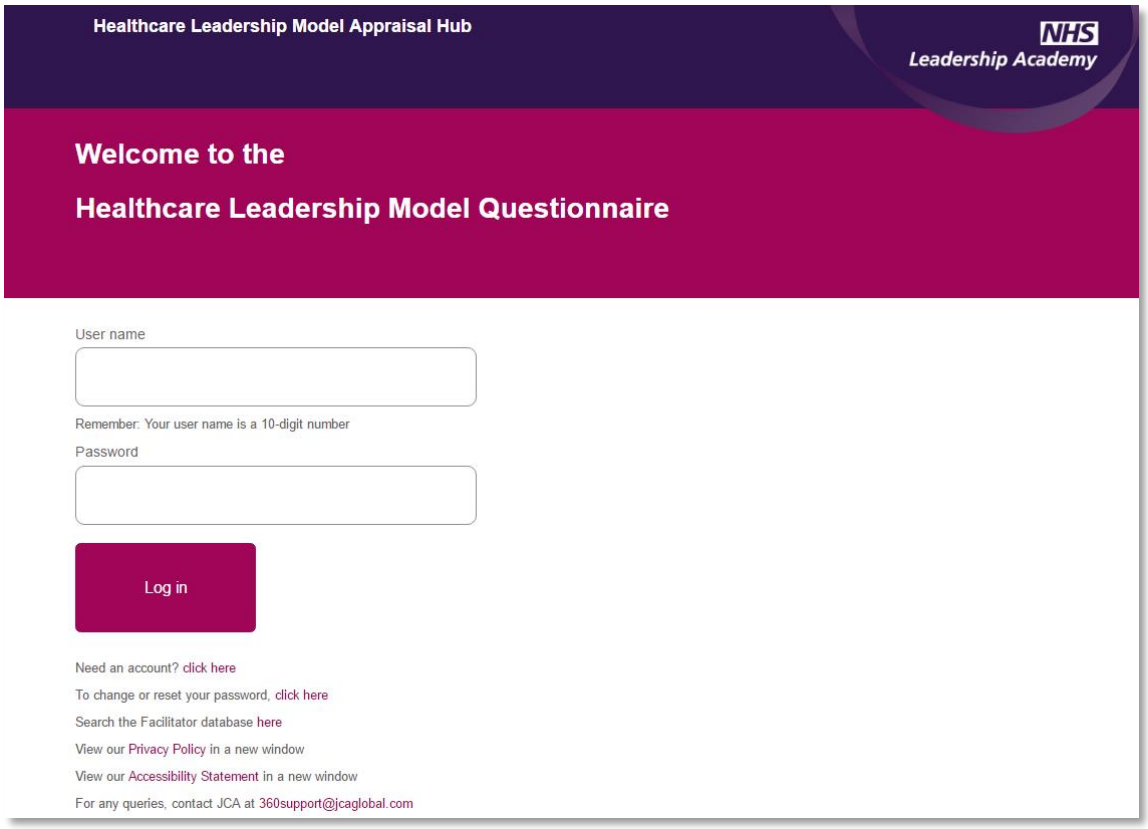
→ Fill out the **form** that will appear on screen



→ At the bottom of this form, you will see the **Register and continue to Healthcare Leadership Model Appraisal Hub** button. Please read and accept the Terms of Service, and then select button.



→ Once you submit the form, you will automatically be taken to the Appraisal hub, (pictured below), where you can then log in with the username and password you received a moment ago.

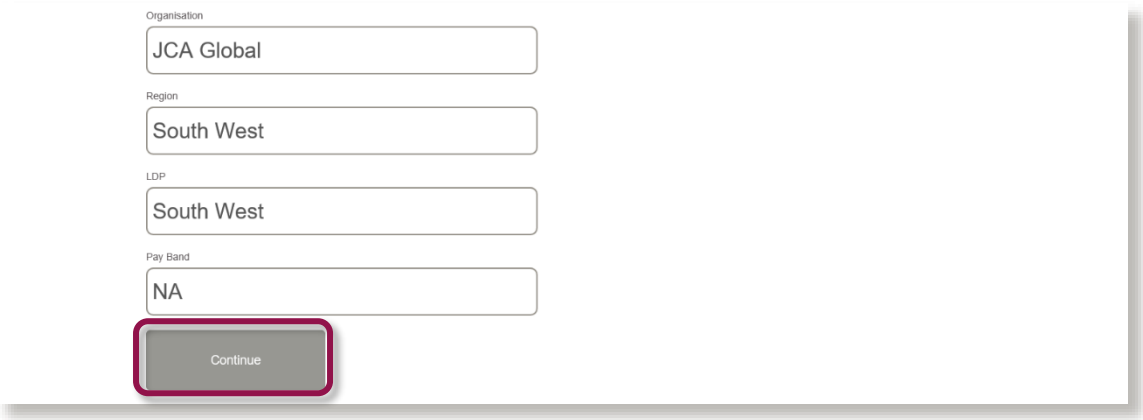


✓ *Note: Throughout this process, please read **all** the provided information and follow **all** instructions carefully.*

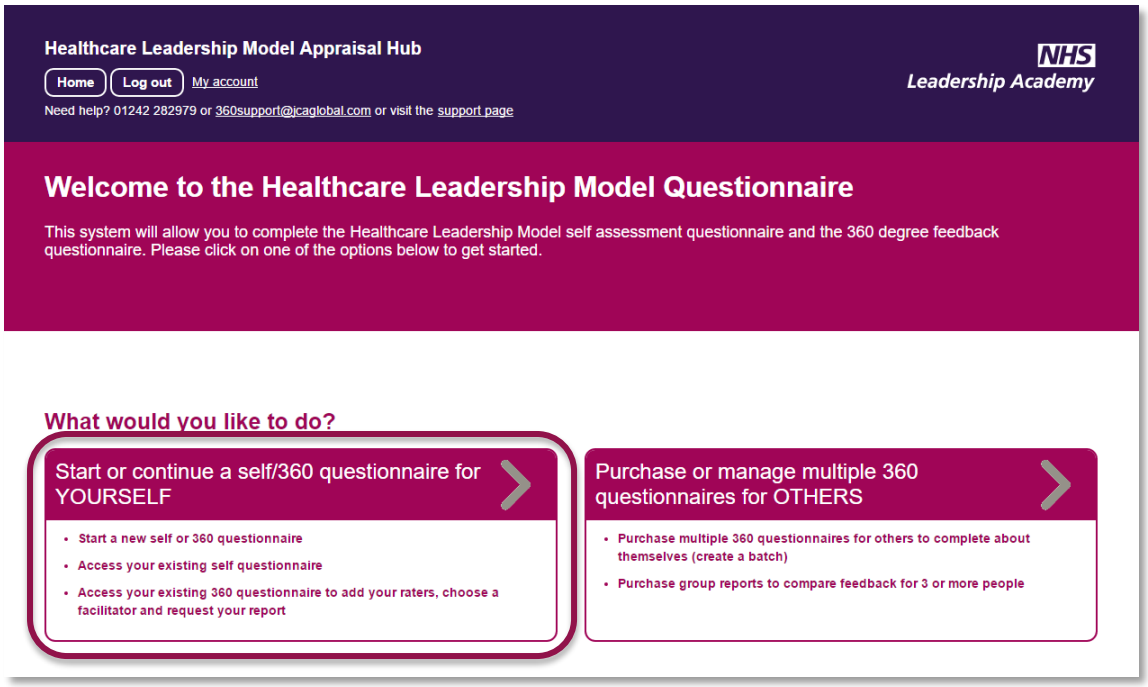
Step 2.

Creating a 360 Assessment Questionnaire

→ If you are logging into the appraisal hub for the first time, or you have recently changed your details, you will be asked to confirm your details by pressing **Continue**

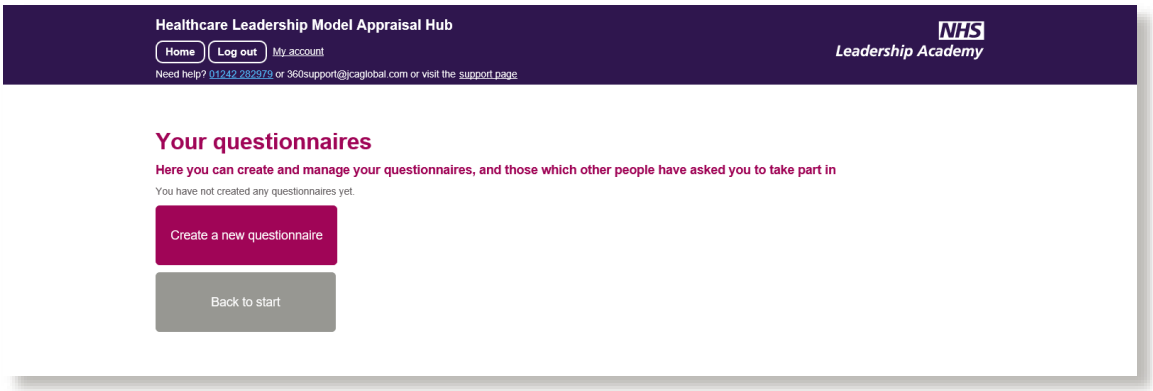


→ Once you have successfully gained access to the hub you will have the option to start a questionnaire for **yourself** or purchase **multiple** questionnaires for **others**:

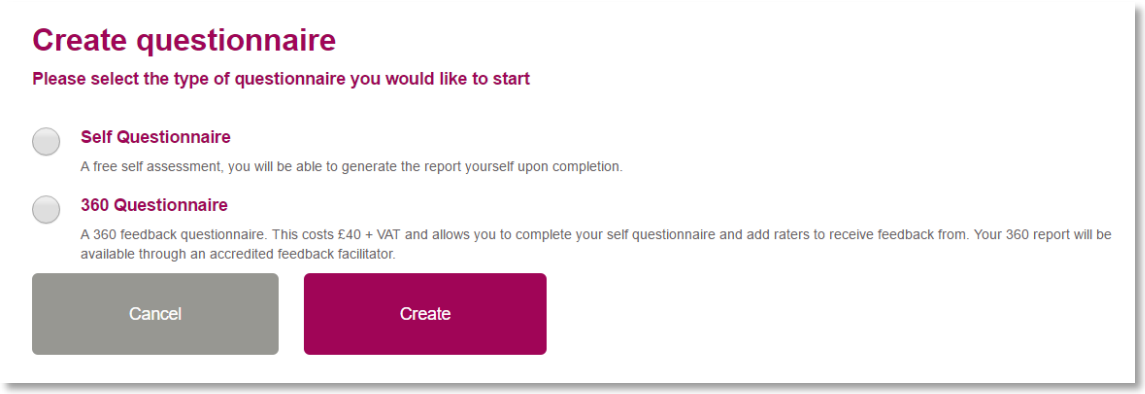


→ Click on the option to **Start or continue a self/360 questionnaire for YOURSELF**.

→ Click on **Create a new questionnaire**



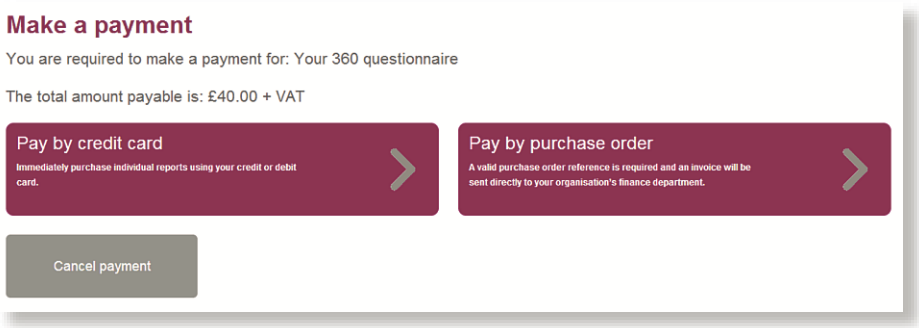
→ Select **360 Questionnaire** from the options available.



→ Choose a date that you wish it to be completed by. This is simply a **guide** for your raters for how long they have to complete their feedback.

→ Click **Create**

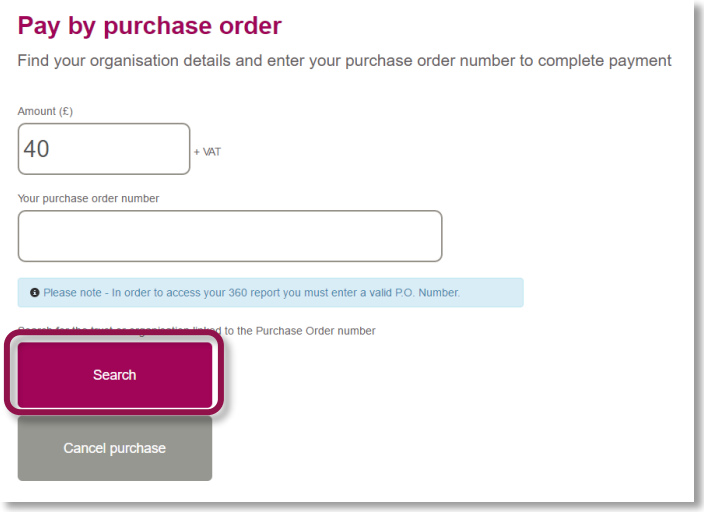
→ This will take you to the following payment screen:



→ Here you can select the **Pay by Credit or Debit Card** option or **Pay by purchase order**

Paying by Purchase Order

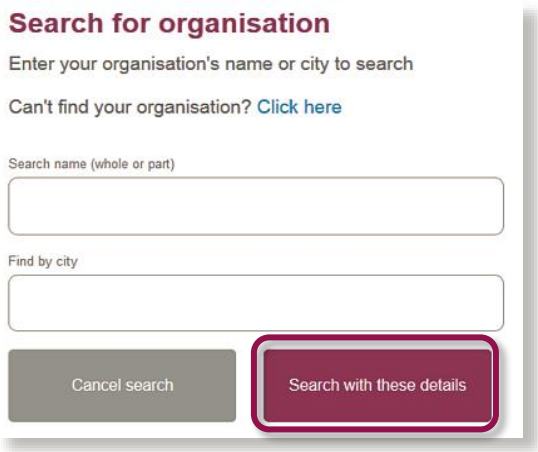
→ Once you have clicked **Pay by purchase order**, you will be presented with the following screen:



→ The figure in the **Amount** field will **default**.

→ You will be required to enter your purchase order number to continue. If you **do not** have a valid purchase order number, you will need to **raise** one via your **finance department.**

→ Lastly, you will be required to enter your **organisation**. Clicking on the **Search** button, you will be presented with this screen:



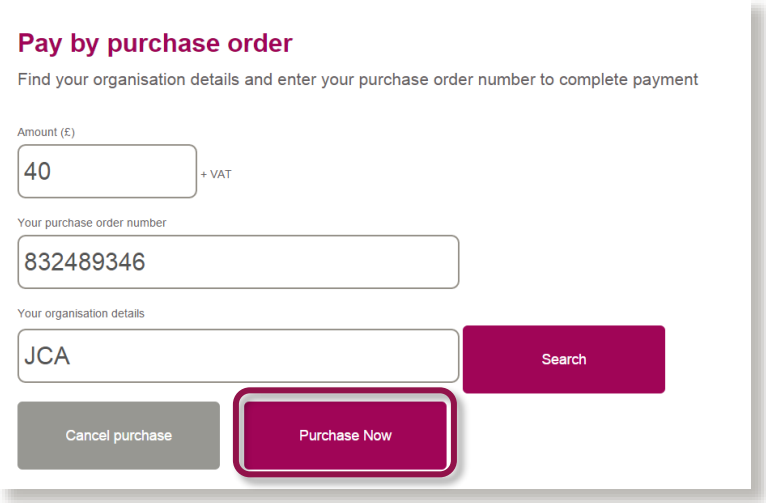
✓ *Here you can search by your organisation's **name or** by the **city** in which it is located. Once you have entered a name or city, select the **Search with these details** button to bring up a list of organisations which match your search.*

→ **Choose** your organisation from the list by clicking the **Select** button next to it.

Name	Address					Options
130A SEWARDSTONE ROAD	MILE END			LONDON	GREATER LONDON	Select
137 LODGE HILL	ABBEY WOOD			LONDON	GREATER LONDON	Select
139 LODGE HILL	ABBEY WOOD			LONDON	GREATER LONDON	Select
15 HOMERTON ROW	HOMERTON			LONDON	GREATER LONDON	Select
15 THORNE CLOSE	THORNE HOUSE			LONDON	GREATER LONDON	Select
181 LODGE HILL	GOLDIE LEIGH	LODGE HILL	ABBEY WOOD	LONDON	GREATER LONDON	Select
1A BEATRICE PLACE	MARLOES ROAD			LONDON	GREATER LONDON	Select
2 WOLVERTON GARDENS	WEST LONDON MENTAL HEALTH TRUST			LONDON	GREATER LONDON	Select

→ Please note: If you **cannot** find your organisation details please select **Click here** above the search fields on the **Search for Organisation** page and fill in the form on the next page. The help desk will add your organisation to the database **as soon as possible** and **email** you once this has been done.

→ Once you have selected your organisation, click the **Purchase now** button to **process** the payment.

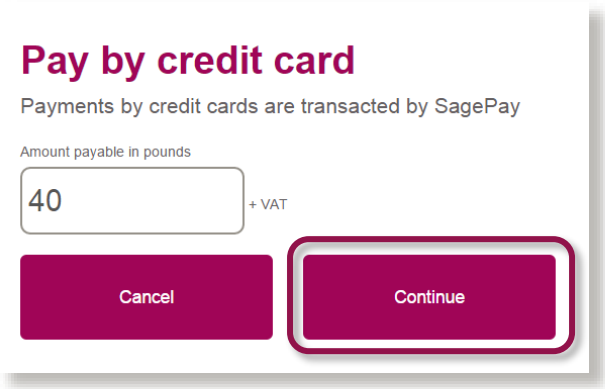


→ If your trust or organisation has **not previously** completed **any transactions with JCA Global** – the company with which the NHS Leadership Academy has partnered with to create the appraisal hub – you will need to **set JCA Global up as a supplier**.

→ Please contact the 360 support team on 01242 282979 or at 360support@jcaglobal.com to request a supplier template if required.

Paying by Credit or Debit Card

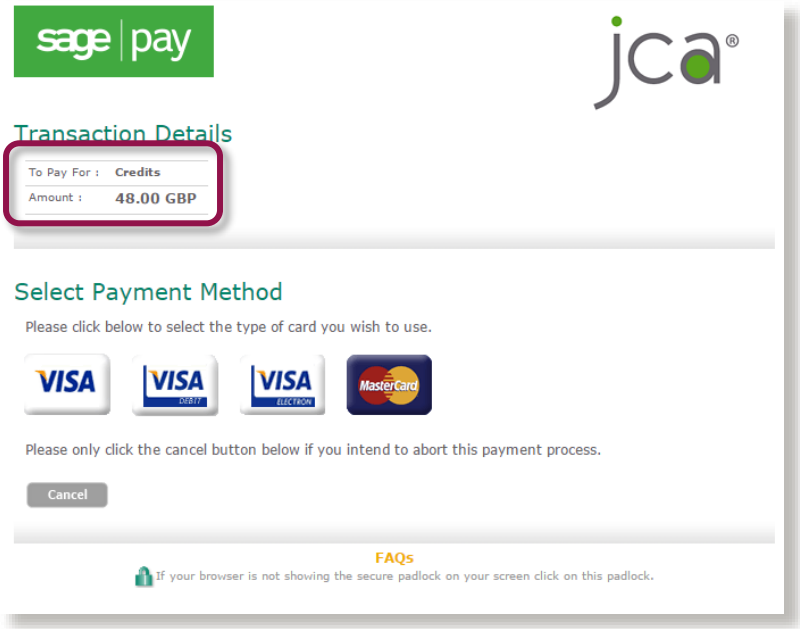
→ Once you have clicked **Pay by Credit Card**, you will be presented with the following screen:



→ All payments made by card within the Appraisal Hub are transacted through **SagePay**, an online secure payment service.

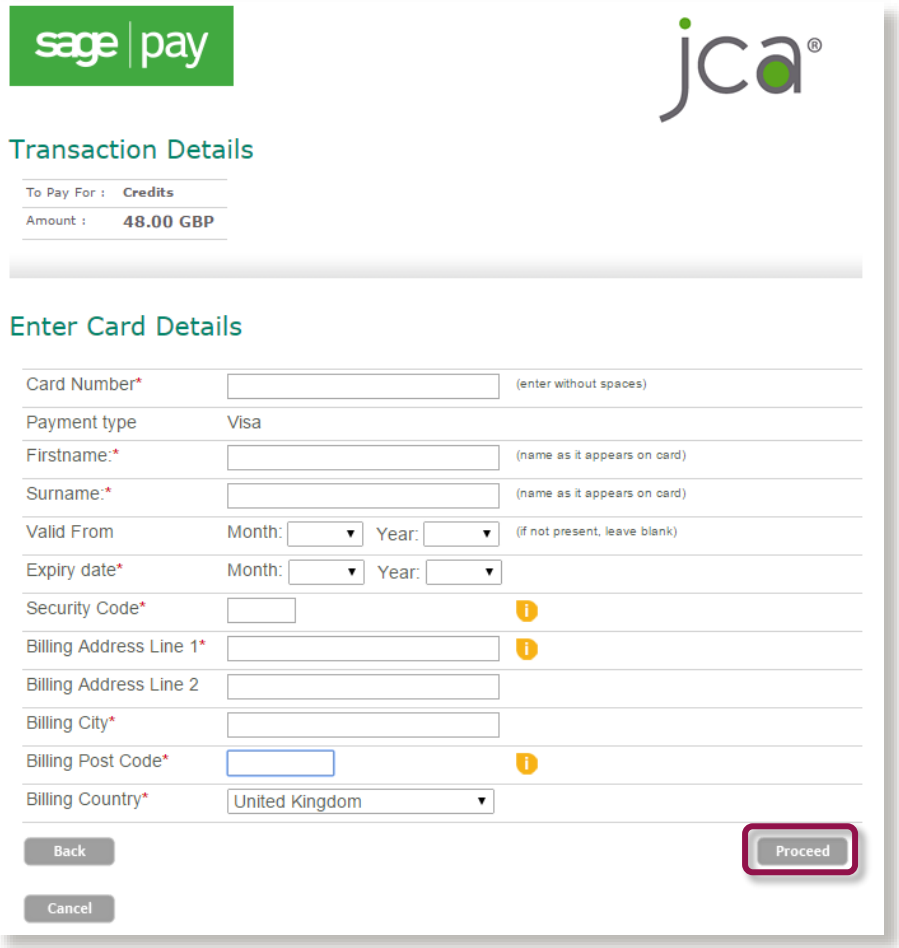
→ The figure in the **Amount** field will **default** according to the **number** of participants and/or group reports entered **previously**.

→ Next click **Continue** and you will be redirected to the SagePay **payment screen**, shown below:



→ The figure shown in the **Amount** field will change to the **full amount payable including VAT**. The 'credits' shown in the **To Pay For** field simply represents the 360 questionnaires and/or group reports that you have purchased within the system.

→ Please select your card type, and you will be taken to the screen below where you will need to enter all your **payment details**:



→ Once you have entered all your details, please select **Proceed** and your payment will be arranged.

✓ *Note: If you add an email address to the Sage Pay screen, you will be emailed a full receipt.*

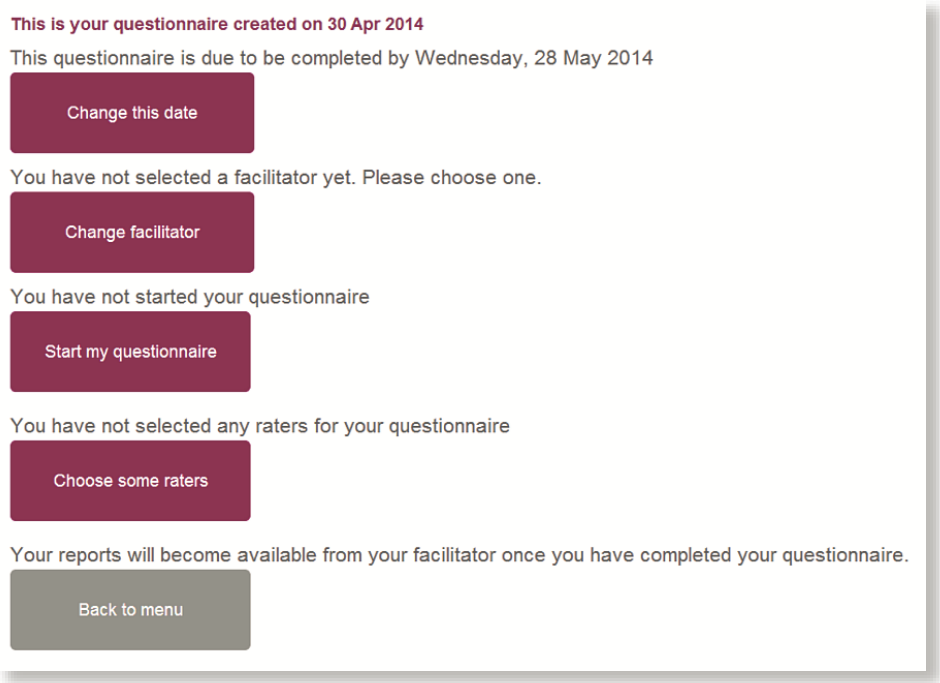
Step 3.

Completing a 360 Assessment Questionnaire

→ Once you have successfully **created** and **purchased** a 360 Questionnaire, you can begin to complete it immediately.

→ You will be presented with a menu screen below and can choose any of the following options in whichever order you prefer:

- Change this date
- Choose a facilitator
- Start my questionnaire
- Choose some raters



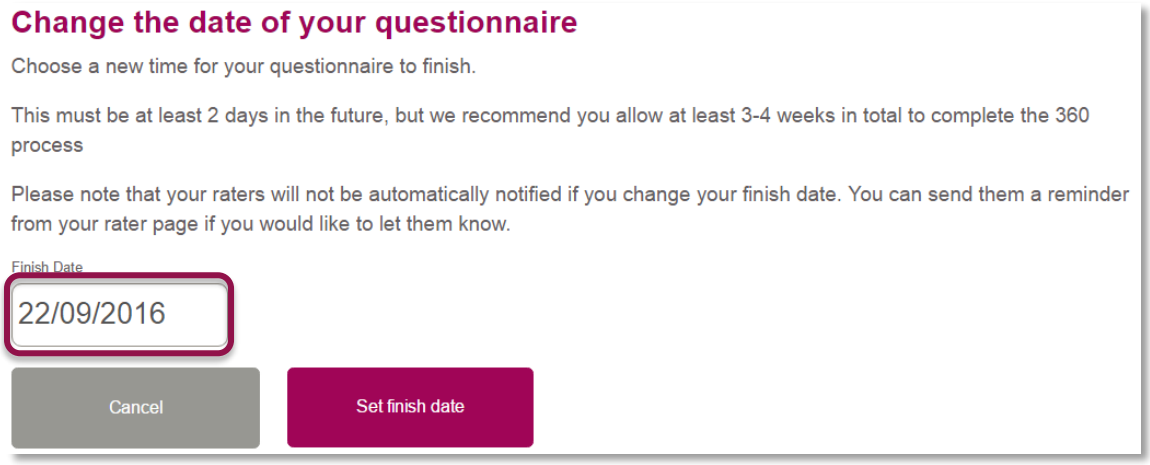
Step 4.

Changing the Date

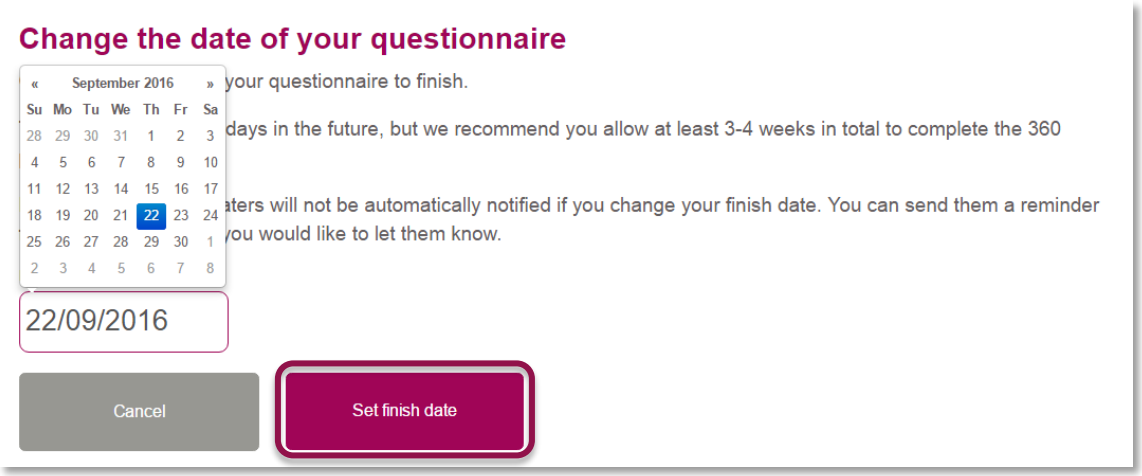
→ This option enables you to change your proposed 360 Questionnaire completion date which in turn will change the **completion date** shown on the **emails** your raters receive.

→ However, there will be **no** indication of a date change automatically **sent** to raters, you will have to do this by selecting **Resend Email** on the **rater screen**.

→ It is also important to note that **nothing** 'happens' if you miss your finish date. It has **no** significance other than to set the date for the auto reminder and completion emails to go out.



→ Once you click on the date it will bring up a calendar to select the date from.



→ Then press **Set finish date**.

Step 5.

Starting your Questionnaire

- → After clicking on **Start my questionnaire,** you will be asked **nine questions** based on the **nine dimensions** of the Healthcare Leadership Model.
- → If you have **Direct Reports** you will also be asked to answer a set of **34 questions** about the team you lead.
- → The questionnaire should take approximately **15 to 30 minutes** to complete. However, if you are unable to complete the questionnaire in one sitting, you can log out and log in at a later date to **continue** from the point at which you left.
- → Throughout the questionnaire, you will be asked to select a level which accurately **describes your behaviour** and also to **rate the importance** of each dimension to your job role.
- → Please note that there are **no better or worse answers**, and the level of behaviour and rate of importance will vary **depending** on the requirements or limitations of **your specific job role.** Try to provide your most **natural** responses to the questions.

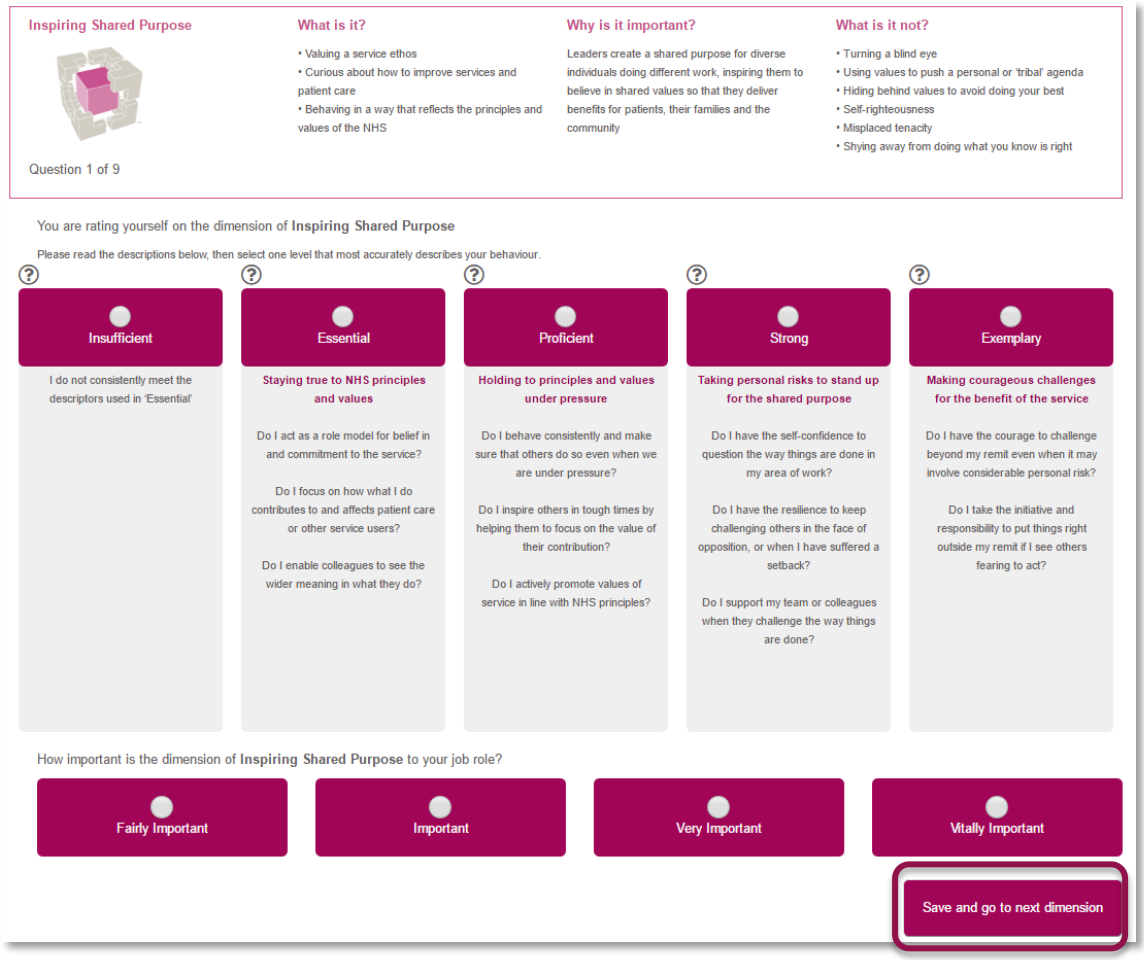
Before you start your questionnaire, you will be asked if you have any **Direct Reports.**

For questions related to the nine dimensions, you are given a brief description of the dimension to read. Then, each question consists of two parts.

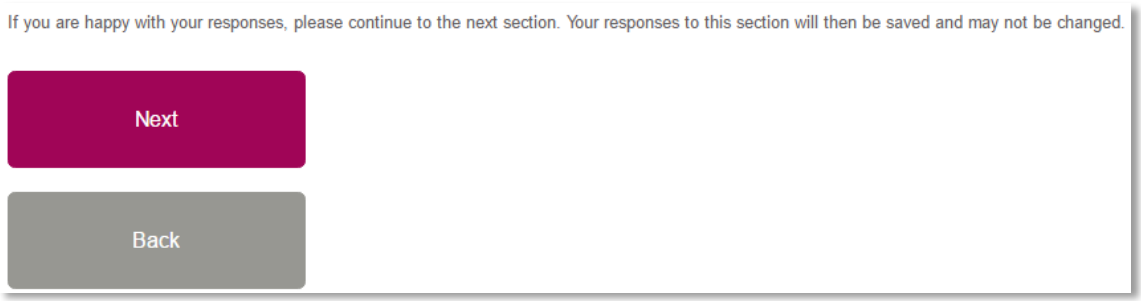
→ For the first part, please read the descriptions and select the option that **best describes your behaviour** in relation to this dimension.

→ For the second part, you are asked to **rate how important** the dimension is to your job role.

One you have selected your answers, click **Save and go to the next dimension**.

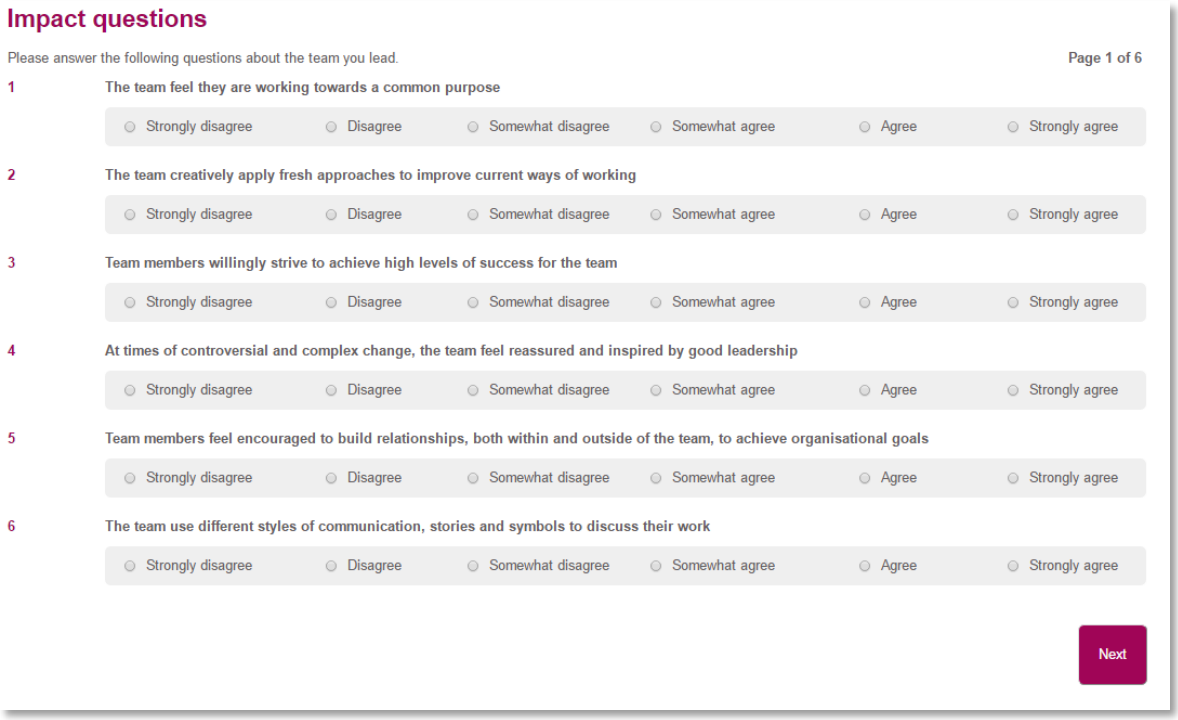


→ Once you have answered all the questions, you will be asked to confirm your ratings. You will be able to see the answers you have given for each question on a summary page and amend them if needed.

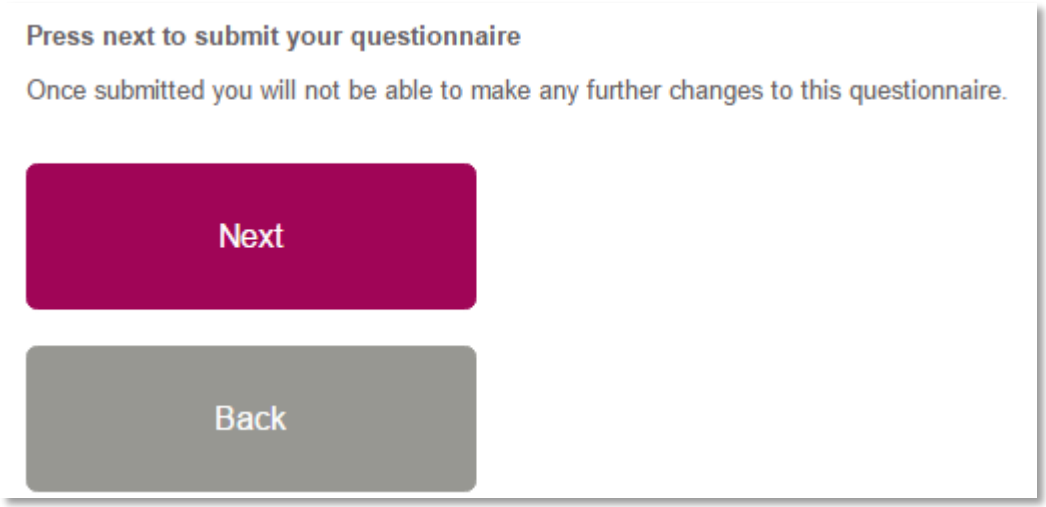


→ You will then have the option to click **Next** to continue or go back and amend your answers. Once you click **Next** you will not be able to return to this section.

If you answered **Yes** to having **Direct Reports** you will now be asked a series of **Impact questions** about the team you lead.



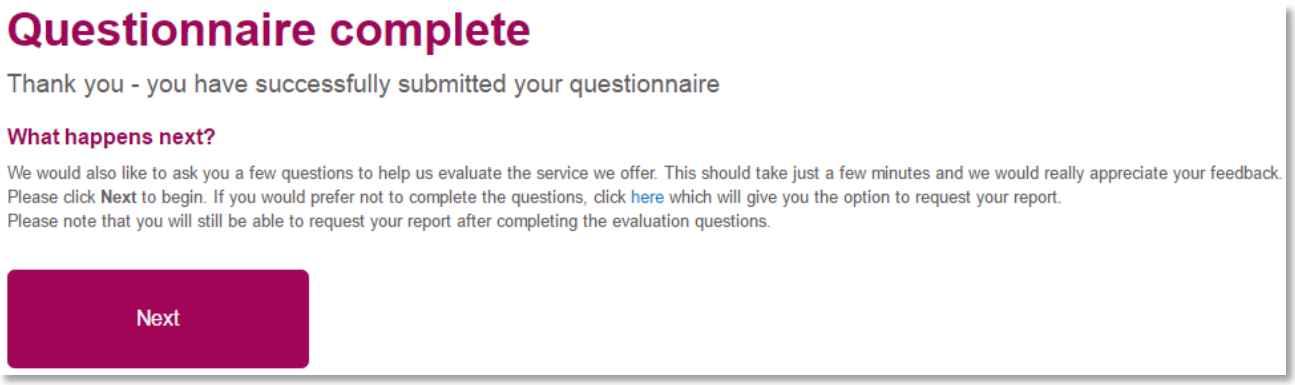
→ Once you have answered all the questions, you will be asked to submit your questionnaire. You can click the **Next** button to submit or the **back** button to go back and make any changes.



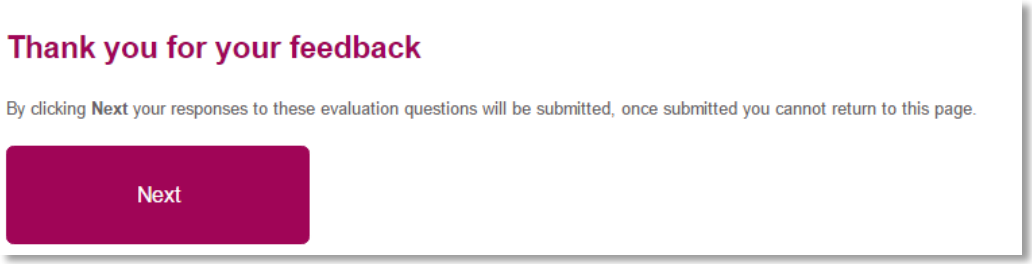
→ You will now receive a message screen informing you that the questionnaire is **complete** and asking you to select your **raters** and **facilitator** if you have not already done so.

→ You will also be asked to answer a few evaluation questions about the service. This will only take a few minutes. If you wish to answer these questions you can click on the **Next** button.

→ If you prefer not to complete these questions, please click on the link provided which will take you to request your report.



→ At the end of the evaluation questions there is a **Next** button to submit these answers.



Step 6.

Choosing a Facilitator

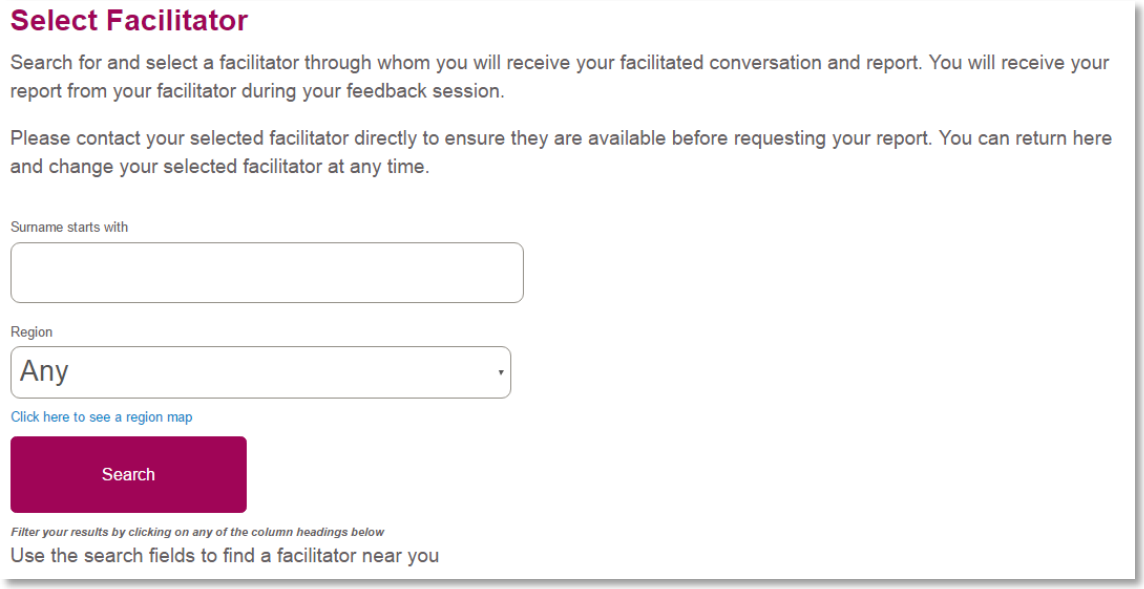
→ You will need to **select a facilitator** in order to **receive** your report which will be presented to you as part of a **dedicated feedback session**.

→ Through exploration of the report with your facilitator, you will gain a real **insight** into your areas of **strengths** and **limitations** and begin to construct a **development plan** from which to **enhance** your effectiveness as a leader.

→ You will be presented with a screen requesting you to **Select Facilitator**.

→ If you **know** the facilitator you would like to choose, enter their surname (or part of) into the **Surname starts with** field.

→ If you **do not** know a facilitator, select a region in the drop down menu to find a list of facilitators in the region most **convenient** for your feedback session. Click **Search.**



- → A list of facilitators will appear based on your search criteria. You can click on the column headings to sort by city or organisation to help you search. You can then **choose** a facilitator by clicking the **Select this facilitator** button that will be displayed on the **right hand side** of the screen, **next to** the facilitator of your choice.
- → The facilitator will then be notified **automatically** by the system of your request.
- → Please note that it is still **your** responsibility to contact the facilitator **directly** to arrange a mutually convenient time and date for your facilitation session.

Step 7.

Choosing Some Raters

→ The 360 Questionnaire enables you to invite **anyone** within your work environment to provide you with **feedback** on your performance and behaviour as a leader. The people you choose to invite are known as **'raters'**.

→ The raters will complete the **same** questionnaire (with **you** in mind) that you have completed and an additional four **free-text** questions. We recommend that you add between 10 and 15 raters.

→ Direct Reports will also be asked to answer a set of 34 questions about the team you lead.

→ Their comments in the four free-text questions will be printed in your report **exactly as written**. The four free-text questions are as follows:

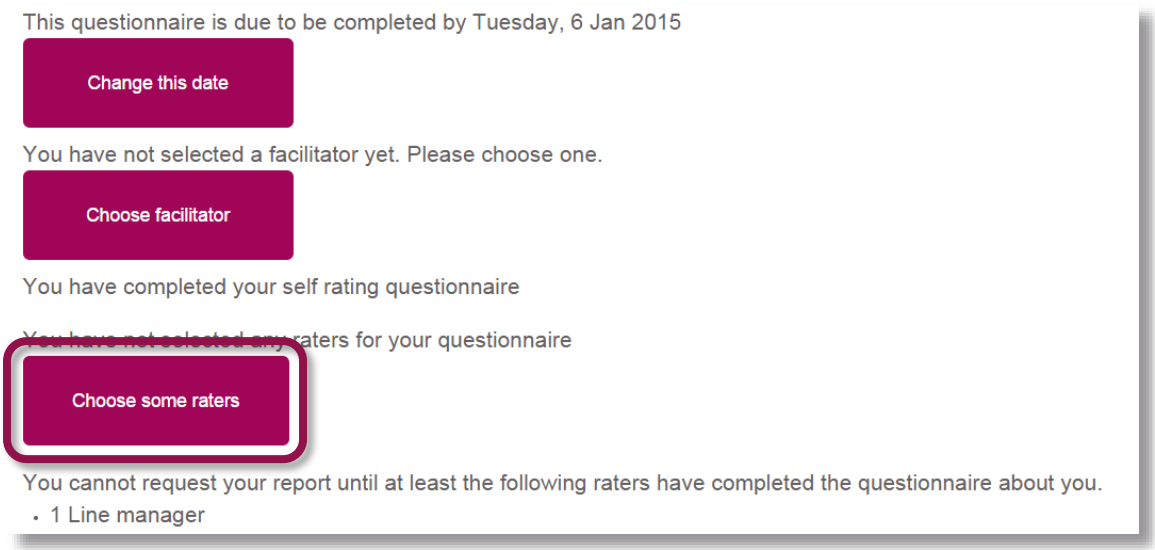
1. What do they do well in their role as a leader?
2. What do they do less well in their role as a leader?
3. How could they improve in their role as a leader?
4. What other advice could you offer them?

Rater Categories

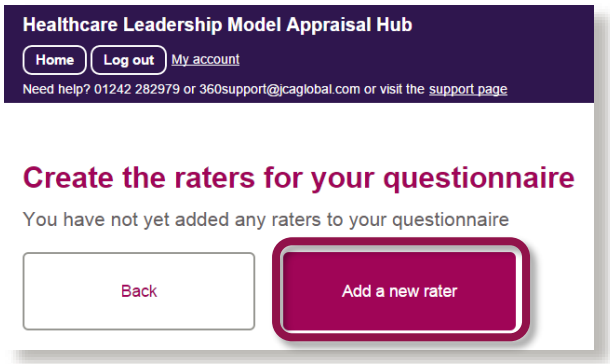
→ The raters you choose will fall into the following categories:

- **Line manager**: the person to whom you **report**. This category is mandatory.
- **Peers:** colleagues and **fellow team members**, probably at a similar job level, with whom you work.
- **Direct reports:** those for whom you have a **direct** responsibility to **lead**.
- **Others:** anyone else you would like to receive feedback from.

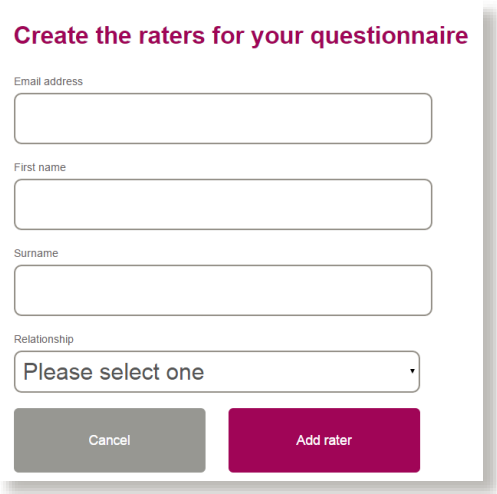
→ Click **Choose some raters** to invite people to rate you.



→ Select **Add a new rater**



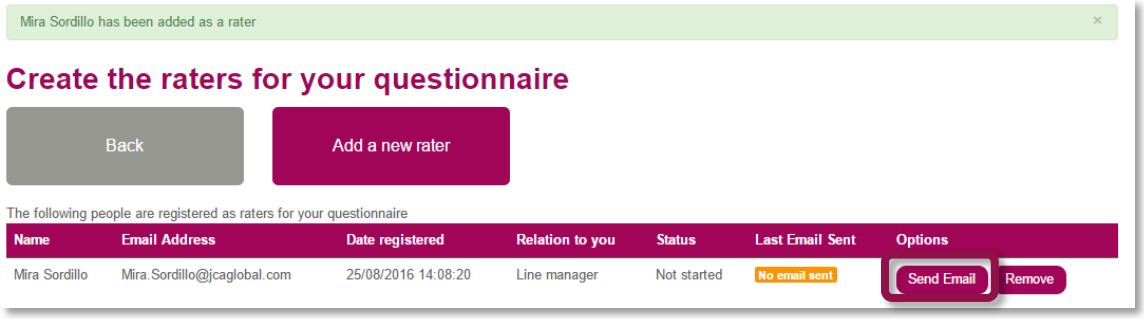
→ To invite people you will need to add the **email address** and **name** of the individual and select their relationship to you.



→ Please ensure email addresses are **correct**, as the system is unable to verify these for you.

→ Click **Add Rater.** You will be taken back to the previous screen.

→ To send their invitations Click **Send Email** alongside each rater.

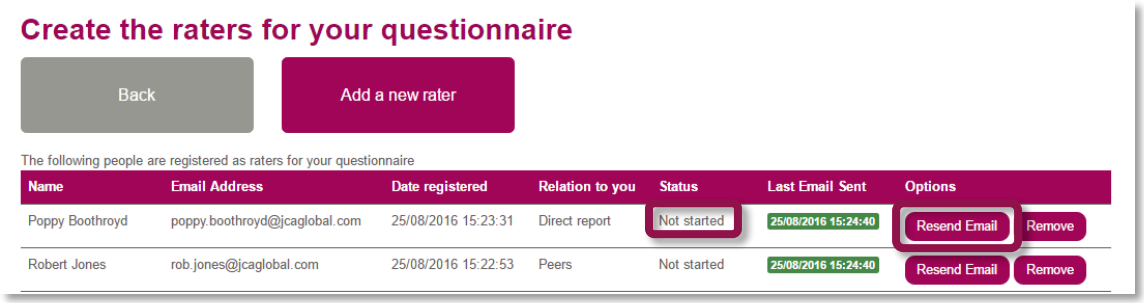


→ Your chosen Rater will then receive a **system-generated email** describing the process you are inviting them to take part in and a **link** to the Healthcare Leadership Model Appraisal Hub to enable them to begin rating you.

→ Without sending this email, your Rater will **not** be aware that you have chosen them and will be **unable** to begin the process

→ Within the questionnaire home screen, there is a **status** for each rater (as seen below) which will **update** accordingly as they complete their ratings of you.

- When they have rated you it will be marked as **Completed.**
- You can also send **reminders** to your raters by clicking on the **Resend Email** button. The system will also send a reminder **automatically** when **50%** of your completion time is **remaining.**



Rater Anonymity

- → The ratings and comments from your raters are presented **anonymously** in your report. The **only** visible description of the rater will be their **relationship to you** (Line manager, Peer, Direct report, Others).
- → However, as most people only have **one** Line manager and your Line manager **must** rate you before you can request your report, your Line manager's ratings and comments **will** be identifiable in your report.
- → It is **recommended** that you choose **at least three** peers and **three** direct reports as raters, although this is optional.
- → If there are **fewer than three** raters in either 'Peers' or 'Direct reports', these will be **disguised** by **moving** them into the 'Others' group. If 'Others' **still** contains fewer than three raters then 'Direct Reports' will **also** be moved into this group. This means that the reader **cannot recognise** any individual's input, which would be easy to do with one or two raters for each relationship.

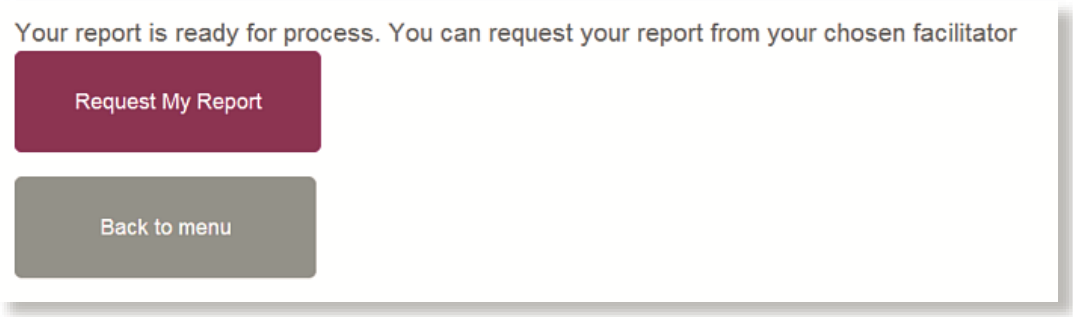
Step 8.

Requesting your Report

→ Once you have completed **all** of the above steps and **at least one Line manager** has finished rating you, the **Request My Report** button will appear. Click this **only** when you are happy that no one else needs to rate you.

→ If you would like your raters to have **additional time** to complete their ratings, you can change your completion date to allow them to do this.

→ Clicking the **Request My Report** button will send it to your chosen facilitator, ready for your face to face session.

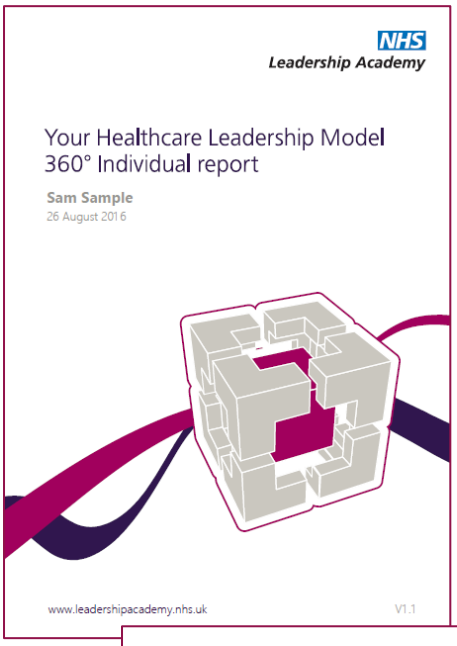


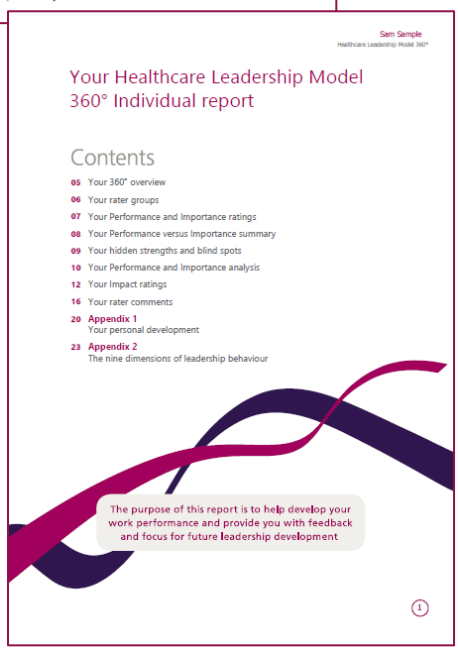
✓ *You will not see your report until you participate in your feedback session with your facilitator.*

Step 9.

Understanding your 360 Assessment Report

→ You will receive your 360 Report as part of a **dedicated feedback session** with the accredited facilitator of your choice.





The 360 report is divided into the following sections:

- The Healthcare Leadership Model
- About this report
- Your 360° overview
- Your rater groups
- Your Performance and Importance ratings
- Your Performance versus Importance summary
- Your hidden strengths and blind spots
- Your Performance and Importance analysis
- Your Impact ratings*
- Your rater comments
- Appendix 1: Your personal development
- Appendix 2: The nine dimensions of leadership behaviour

*Your Impact ratings will only appear if you have answered 'Yes' to having Direct Reports when completing your questionnaire

Overview of Report Structure

1. The Healthcare Leadership Model

→ This section of the report **describes** the Healthcare Leadership Model upon which the 360 Assessment is based and explains **why** and **how** it is useful to leaders.

→ This section also covers **personal qualities** and how being **aware** of our **strengths** and **limitations** will have a **direct effect** on how we behave and interact with others.

2. About this report

→ Here you will gain an **overview** of the report itself, how to use it and your next steps.

3. Your 360° overview

→ Here you are presented with a **diagram** that displays your **average rating** on the nine leadership dimensions of the Healthcare Leadership Model.

→ Your **personal** ratings are presented **separately** to those of your **raters** to enable you to **compare** and **contrast**.

4. Your rater groups

→ The table in this section displays the **average** ratings given on each of the 360° dimensions by your different rater groups. This table enables you to see any gaps in perception between yourself and your rater groups.

5. Your Performance and Importance ratings

→ This section of the report displays in a **visual format** your Performance and Importance ratings for each of the **nine dimensions** of the Healthcare Leadership Model.

→ Your **personal** ratings are presented separately to those of your **raters** to enable you to **compare** and **contrast**.

6. Your Performance versus Importance summary

→ In this section you are presented with a **diagram** that displays a **summary** of your ratings by comparing low to high **Performance** against low to high **Importance**. This can demonstrate and in turn improve how you **prioritise** your development focus

→ Ratings that align with **low Performance** on dimensions that are of **high Importance** will be shown in the **risk** area (marked in **red**). You may want to prioritise your development actions **here**.

→ Ratings that align in **similar** positions against Performance and Importance will be shown in the **balanced** area (marked in **amber**).

→ Ratings that align with **high Performance** on dimensions that are of **low Importance** will be shown in the **opportunity** area (marked in **green**).

7. Your hidden strengths and blind spots

→ The table in this section shows the spread of scores given by **yourself** and **your raters** for each dimension.

→ Each coloured circle indicates the **number of raters** who gave you that particular rating. The more people who gave you the same rating, the larger the coloured circle will be in that section.

8. Your Performance and Importance analysis

→ This section of the report shows you the **spread of scores** given by yourself and all rater groups **against each of the nine dimensions**.

9. Your Impact ratings

→ This section of the report examines the level of engagement by your Direct Reports in relation to the nine Healthcare Leadership Model dimensions.

→ The table in this section displays the spread of scores given by yourself and your Direct Reports on each of the nine leadership dimensions plus seven additional items.

→ Please note that this section will only appear if you have answered 'Yes' to having Direct Reports when completing your questionnaire.

10. Your rater comments

→ This section displays the **free-text** comments provided by your 360 feedback raters in answer to the following **four** questions:

1. What do they do well in their role as a leader?
2. What do they do less well in their role as a leader?
3. How could they improve in their role as a leader?
4. What other advice could you offer them?

→ These comments are presented in your report **as written** by your raters.

11. Appendix 1: Your personal development

→ Here you are presented with the opportunity to begin mapping out a **personal development plan** based upon your **reflections** of what you have learned about yourself from reading your report.

12. Appendix 2: The nine dimensions of leadership behaviour

→ Here you are presented with the nine dimensions of leadership behaviour and the behaviours required for each of the rating scales.

Help and support

If you'd like further help and support with your 360 assessment, please don't hesitate to contact the helpdesk on +44 (0)1242 282 979 or by emailing 360support@jcaglobal.com.

Alternatively, you can view **Frequently Asked Questions** by following this link: http://modelfaq.jcaglobal.com/