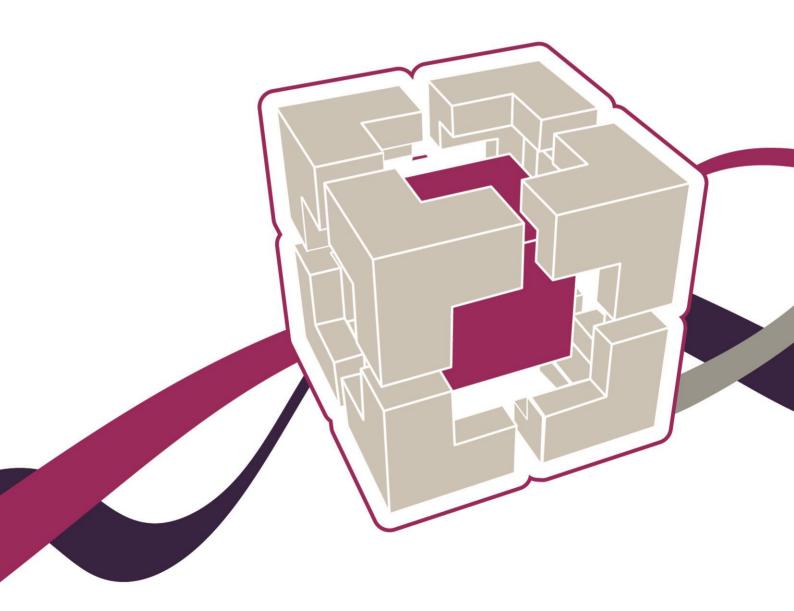


# The Healthcare Leadership Model Appraisal Hub

360 Assessment User Guide



### 360 Assessment User Guide

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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.

#### 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

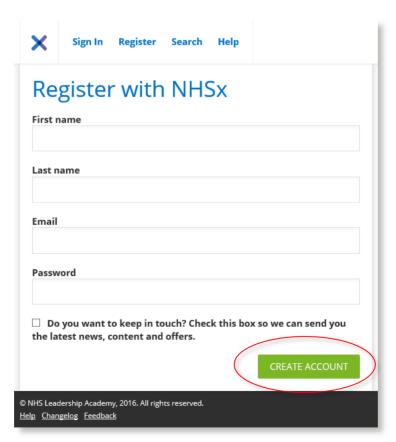
→ In order to create and begin a 360 assessment, you will need to access the Healthcare Leadership Model Appraisal Hub via the following link:

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:

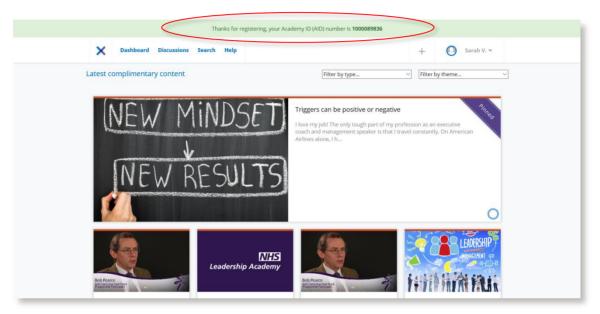
https://nhsx.uk/register

→ 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 6.

- → 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.

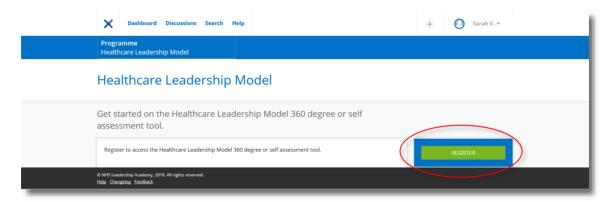


- → If you were already registered and logged in, click **Dashboard** at the top of the page and you will be taken to the screen shown above. If you have just created an account, you will already be at this page.
- → Whilst you are on this page, scroll down to the bottom of the page until you reach the section on the page headlined as '**Programmes**'.

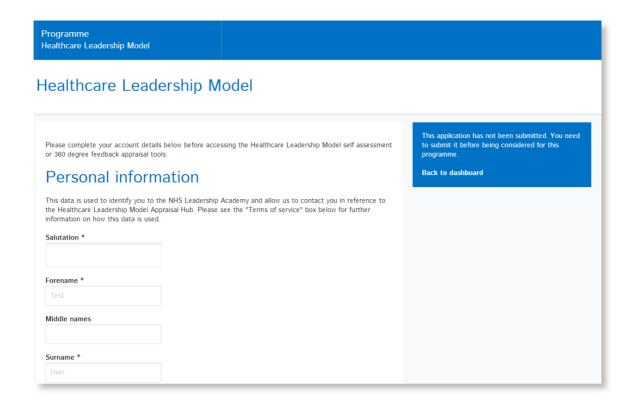
→ You will see 'Healthcare Leadership Model' under 'All Programmes'. Click Register on this programme to sign up.



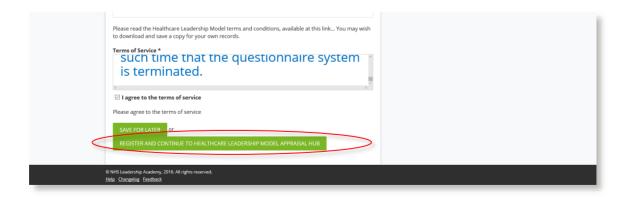
→ Press 'Register' again to confirm that you would like to access the Healthcare Leadership Model



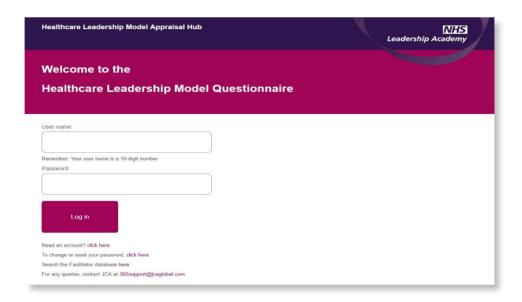
→ Fill out the **form** that will appear on screen (shown below)



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



→ 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.

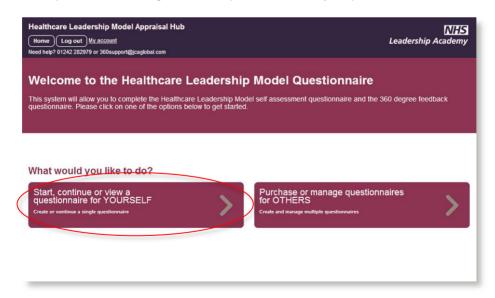
## Step 2.

# **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' (see below)

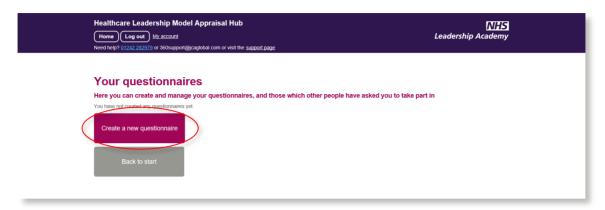


→ Once you have successfully gained access to the hub you will have the option to start a questionnaire for **yourself** or purchase **multiple** questionnaires for **others**:



→ Please select the left hand button (circled above)

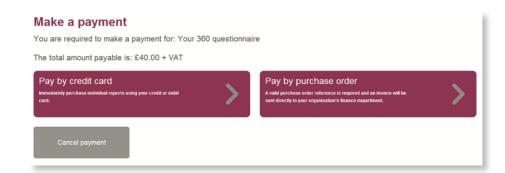
→ Click on Create a new questionnaire



→ Select **360 Questionnaire** from the drop down menu.



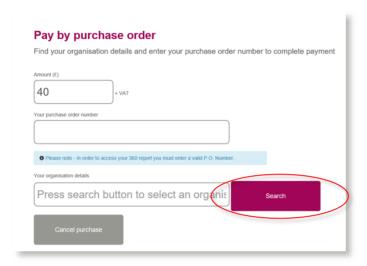
- → Choose a date that you wish it to be completed by. This is simply a **guide** for your raters for how long they have to complete their feedback.
- → Click Create
- → This will take you to the following payment screen:



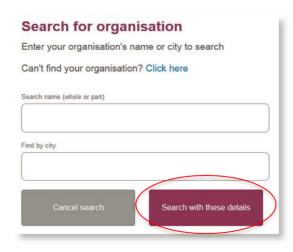
→ Here you can select the Pay by Credit or Debit Card option, or Pay by purchase order

### **Paying by Purchase Order**

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

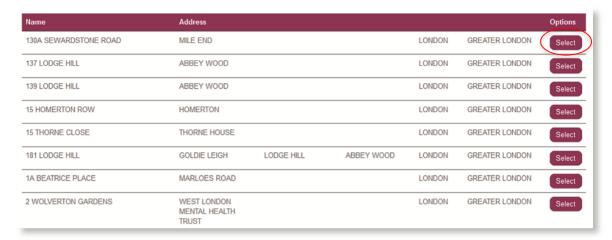


- → The figure in the **Amount** field will **default**.
- → You will be required to enter your purchase order number to continue. If you do not have a valid purchase order number, you will need to raise one via your finance department.
- → Lastly, you will be required to enter your **organisation**. Clicking on the **Search** button alongside the organisation field will present you with this screen:

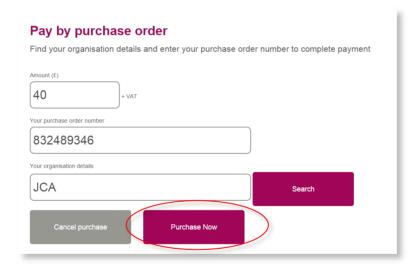


✓ Here you can search by your organisation's **name** or by the **city** in which it is located. Once you have entered a name or city, select the **Search with these details** button to bring up a list of organisations which match your search.

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



- → 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:

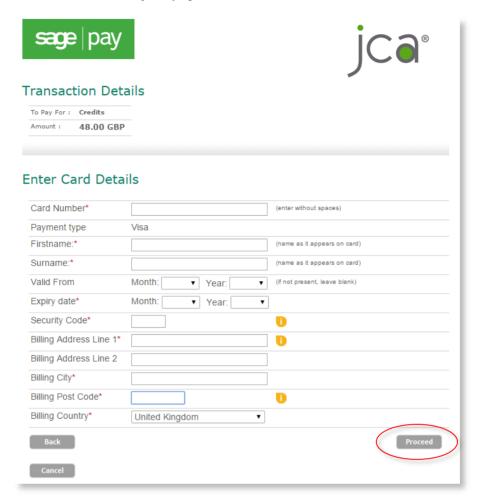


- → All payments made by card within the Appraisal Hub are transacted through SagePay, an online secure payment service.
- → The figure in the Amount field will default according to the number of participants and/or group reports entered previously.
- → Next click **Continue** and you will be redirected 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. They are called 'credits' in this instance because you can redeem them whenever you choose by adding participants.

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

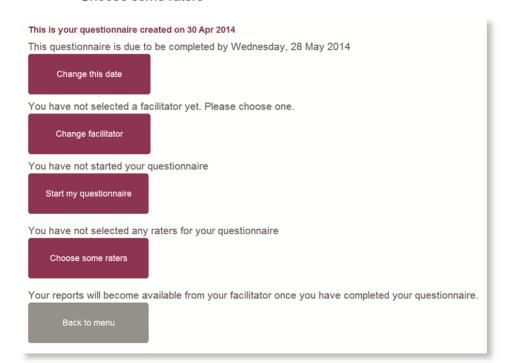


→ Once you have entered all your details, please select Proceed and your payment will be arranged.

## <u>Step 3.</u>

# **Completing a 360 Assessment Questionnaire**

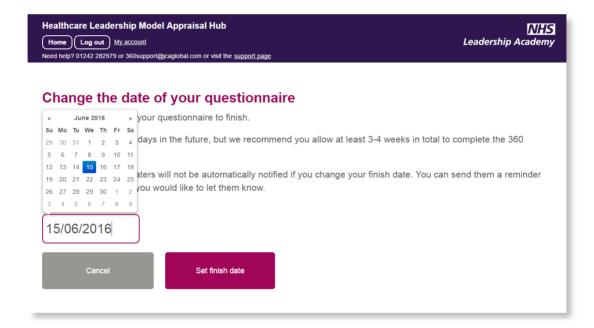
- → Once you have successfully **created** and **purchased** a 360 Questionnaire, you can begin to complete it immediately.
- → You will be presented with a menu screen below and can choose any of the following options in whichever order you prefer:
  - Change this date
  - · Choose a facilitator
  - Start my questionnaire
  - Choose some raters



## <u>Step 4.</u>

## **Changing the Date**

- → This option enables you to change your proposed 360 Degree 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.
- → You will be able to choose an appropriate completion date from the date picker that will appear when you click into the "Finish Date" box.



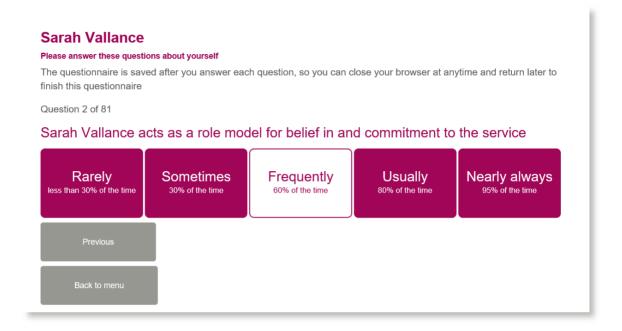
## <u>Step 5.</u>

## **Starting your Questionnaire**

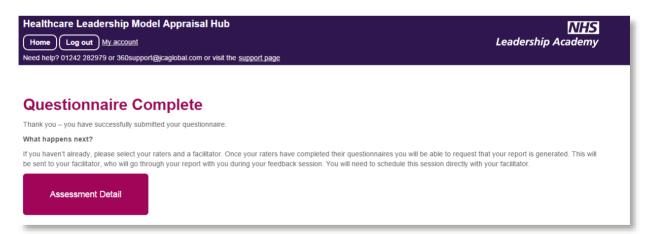
- → After clicking on **Start my questionnaire**, you will be asked **81 questions** based on the **nine dimensions** of the Healthcare Leadership Model.
- → The questionnaire should take approximately **20 to 30 minutes** to complete. However, if you are unable to complete the questionnaire in one sitting, 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 rate the importance of each dimension to your job role, followed by a series of leadership performance questions based on frequency of behaviour.
- → Please note that there are no better or worse answers. Frequency 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.

#### Sarah Vallance Please answer these questions about yourself The questionnaire is saved after you answer each question, so you can close your browser at anytime and return later to finish this questionnaire Question 1 of 81 Inspiring shared purpose · Curious about how to improve services and patient care . Behaving in a way that reflects the principles and values of the NHS Leaders create a shared purpose for diverse individuals doing different work, inspiring them to believe in shared values so that they deliver benefits for patients, their families and the community What is it not? Turning a blind eye · Using values to push a personal or 'tribal' agenda Hiding behind values to avoid doing your be Self-righteousness Misplaced tenacity Shying away from doing what you know is right How important is the dimension of *inspiring shared purpose* to your job role? Low Importance High Importance

- → To answer each question, simply **click** on the button that you think most closely describes your behaviour
- → The possible answers are **the same** for every question, all that will change as you go are the **statements**



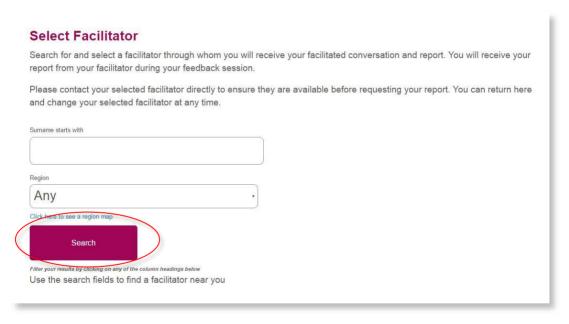
- → Once you have answered all of the questions, you will receive a message screen informing you that the questionnaire is **complete** and asking you to select your **raters** and **facilitator** if you have not already done so
- → Click the **Assessment Detail** button to take you back to the menu where you can begin choosing your facilitator and raters



## Step 6.

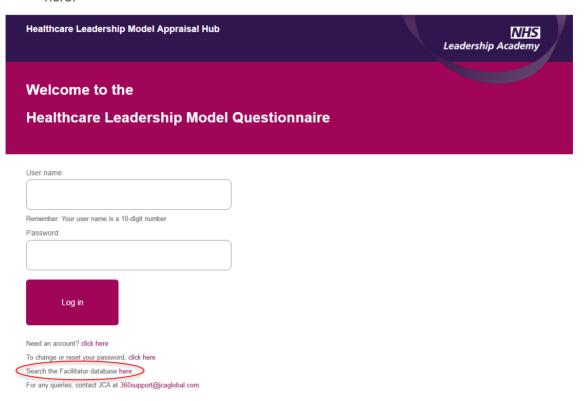
## **Choosing a Facilitator**

- → 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 you can select a region in the drop down menu to find a list of facilitators in a region most convenient for your feedback session. Click Search.



- → A list of facilitators will appear based on your search criteria. 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.

→ You can also search for a facilitator without needing to log in. This option is available here:



## 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.
- → 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.
  - 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.

This questionnaire is due to be completed by Tuesday, 6 Jan 2015

Change this date

You have not selected a facilitator yet. Please choose one.

Choose facilitator

You have completed your self rating questionnaire

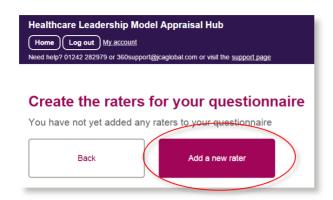
You have not selected any raters for your questionnaire

Choose some raters

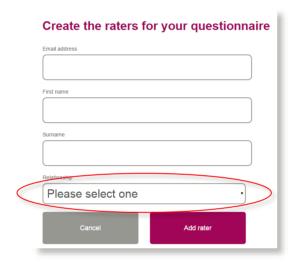
You cannot request your report until at least the following raters have completed the questionnaire about you.

• 1 Line manager

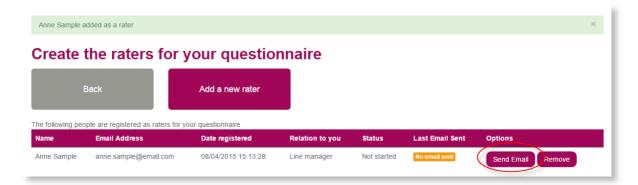
→ Select Add a new rater



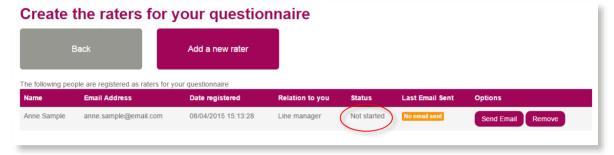
→ To invite people you will need to add the **email address** and **name** of the individual and select their relationship to you.



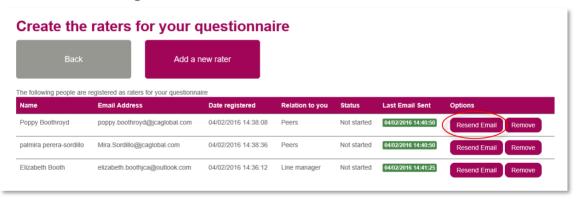
- → Please ensure email addresses are **correct**, as the system is unable to verify these for you.
- → The Line manager option is **mandatory**.
- → Click Add Rater. You will be taken back to the previous screen.
- → Click **Send Email**.



- → 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.



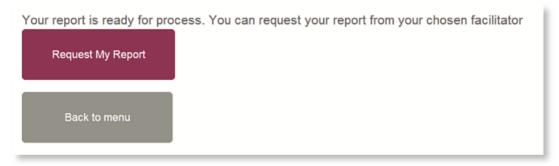
#### Rater Anonymity

- → 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.

## **Processing 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 add your report to the processing queue and send it to your chosen facilitator.



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

## <u>Step 9.</u>

# **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 performance and importance ratings
- Your performance versus importance summary
- Your 360° overview
- Your Rater groups
- Your highest scoring items
- · Your lowest scoring items
- Your hidden strengths
- Your blind spots
- Your item analysis
- Your Rater comments
- Appendix

## **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 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.

#### 4. 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**).

#### 5. 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**.

#### 6. Your Rater groups

- → This table 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.

#### 7. Your highest scoring items

- → This table displays the five behaviours that received the highest average rating from your Raters.
- → These behaviours probably indicate areas of **strength**.

#### 8. Your lowest scoring items

- → This table displays the five behaviours that received the lowest average rating from your Raters.
- → These behaviours probably indicate areas for particular development.

#### 9. Your hidden strengths

- → This table displays the **five behaviours** that show the **biggest difference**; where **others** rated you **higher** than you rated **yourself**.
- → These behaviours may indicate areas of hidden strength.

#### 10. Your blind spots

- → This table displays the **five behaviours** that show the **biggest difference**; where **others** rated you **lower** than you rated **yourself**.
- → These behaviours may indicate your **blind spots**, possibly **weaknesses** that **others** see more presently than **you** do.

#### 11. Your item analysis

- → This section of the report shows you the **spread of scores** given by yourself and all Rater groups **against each behaviour**.
- → The answers are presented in order of rating from 1 to 5, 1 representing rarely and 5 representing nearly always.

#### 12. 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.

#### 13. Appendix

→ 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.

## 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/

