

The Healthcare Leadership Model Appraisal Hub and 360° Report

Facilitator User Guide



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Facilitator 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 designed to enable **leaders** within healthcare to collect **feedback** on their individual or group **behaviour** and **performance** against the **nine leadership dimensions**.
- → The Hub enables individuals to complete two questionnaires:
 - A Self-assessment questionnaire based on the Healthcare Leadership Model that evaluates their own self-perception of their leadership behaviour in the workplace;
 - A **360° Feedback assessment**, which **combines** the **self-assessment** of the same leadership behaviours, with **ratings** provided by chosen colleagues.
- → The **results** of these assessments are provided in a **report**, downloaded from the Healthcare Leadership Model Appraisal Hub.
- → There are three different types of reports available from the Hub
 - Self-assessment Report this gives an indication of an individual's selfperception of their leadership behaviour
 - 360° Assessment Report this gives an indication of an individual's leadership behaviour and performance based on a combination of their self-perception and feedback ratings provided by their colleagues
 - Group Report this gives a group or team an indication of their overall performance and how the participants work as a team, identifying strengths and areas for development for the group as a whole
- → This 360° Feedback Report is used as the **basis** of **discussion** during the feedback session and gives the participant or group an indication of their current **performance** and **behaviour**.
- → This provides a platform from which an understanding of the individual's or group's strengths and development areas can be built. The information within the report is treated as confidential to the individuals.
- → Your role as facilitator is to guide the participant or group of participants through their 360° report(s) and provide them with support in creating a development plan based on the feedback.

The purpose of this guide

- → This guide provides detailed information for 360° facilitators on how to use the Healthcare Leadership Model Appraisal Hub and the 360° report. It is designed to accompany the Facilitator Workbook and Group Facilitator Workbook.
- → Whereas the workbook provides guidance on the facilitation process and the feedback session, this guide acts as a more detailed, technical resource for using the online system.

Who is this guide for?

→ This guide has been designed to be used by facilitators accredited to provide 360° feedback using the Healthcare Leadership Model, to individuals and/or groups of individuals. If you are not a registered facilitator, but are interested in training to become one, you are welcome to contact the training team at 360training@jcaglobal.com to request course details.

Who should I contact if I have any questions?

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

Healthcare Leadership Model Appraisal Hub

→ The online 360° feedback tool, designed to support 360° feedback on the healthcare leadership behaviours, is called the Healthcare Leadership Model Appraisal Hub. This section of the guide provides you with all the information you need to register with, log-in to, and use the Hub.

Accessing the Healthcare Leadership Model Appraisal Hub for the first time

- → Once you have successfully completed your facilitator training and accreditation, there are six steps you will need to take in order to access the Appraisal Hub and gain facilitator privileges within the system.
- 1. If you have not done so already when completing your 360 as part of your training, you will need to **create an account** on **NHSx**, the Leadership Academy's platform, before accessing the Appraisal Hub. You can do this by following this link:

https://nhsx.uk/register

- When you have created an account, you will receive an email from NHSx containing your 10-digit username. Click on the link in this email to confirm your account, which will redirect you to NHSx, and sign you in.
- **3.** Go to the 'Dashboard' at the top of the page and find Healthcare Leadership Model under 'Available Programmes'. Click Register.
- Fill out the form that will appear on screen titled 'Personal Information', making sure to click or fill in all the questions, and then select Register and continue to Healthcare Leadership Model Appraisal Hub at the end.
- **5.** You will then be redirected to The Healthcare Leadership Model Appraisal Hub, or you can access it by following this link:

https://modelappraisalhub.leadershipacademy.nhs.uk *Please log into the 360 Appraisal Hub in order to activate your account.**

6. Finally, once you have completed the stages above, please email 360support@jcaglobal.com and request your facilitator privileges. The helpdesk will 'switch on' your facilitator privileges with the Appraisal Hub and notify you when this has been done. You will then be able to use the Appraisal Hub with full facilitator privileges.

* **Please note:** At this stage, you will not be able to see your Facilitator button on the home screen of the Appraisal Hub.

Ongoing Access to the Healthcare Leadership Model Appraisal Hub

→ Once you have accessed the 360° Appraisal Hub for the first time, you can access the Hub on an ongoing basis by using the following link and entering your username and password:

https://modelappraisalhub.leadershipacademy.nhs.uk

Healthcare Leadership Model Appraisal Hub	Leadership Academy
Welcome to the Healthcare Leadership Model Questionnaire	
User name Password Log in	
To change or reset your password, click here For any queries, contact JCA at 360support@jcaglobal.com	

Viewing the Home Screen

- → Once you have successfully logged in to the Hub, you will immediately be taken to your home screen. As an accredited feedback facilitator you will be presented with three options.
- Unless you are undertaking a 360 assessment for yourself or setting assessments up for other people, you will not need to use the top two buttons.
- → Click on View my facilitator session requests in order to see and manage the requests you have received for feedback sessions.



Managing your session requests

- → Once you have clicked the View my facilitator session requests button, you will be taken to your facilitator page.
- → Here you can see any individual feedback sessions and/or group feedback sessions that have been requested and if ready, you can download the completed reports. The status column will indicate the current state of any requests you have received.

Healthcare Leadership Model Appraisal Hub Home Log out My.account Need help? 01242 282979 or 360support@jcaglobal.com or visit the <u>support page</u>	Leadership Academy
Welcome to your facilitator page	
Your feedback reports are split between Individual Feedback and Group Feedback, select the ap the corredsponding requests. In order to facilitate a session you will need to download the compl <i>Group sessions</i> you will need to accept the request prior to downloading the report.	propriate tab below to view eted 360 degree report. For
Please do not mark a session as complete until you have attended the session with the individua marked a session as complete it will be removed from your list below.	l or group. Once you have
Individual Feedback Group Feedback View completed	
Name Email Telephone Requested Status	Action
You have no incomplete individual facilitation requests	
You have completed 0 feedback sessions in the last 12 months.	
Please remember you must complete at least 2 feedback sessions in every rolling 12 month period	od to stay accredited.
Back to menu	

- → You will see that the **Status** column shows either 'Being Processed' or 'Ready'
- → 'Being Processed' informs you that the report is in the processing queue and will shortly be available for review. You will receive an email notification when it is ready
- → When the individual or group 360° report is available, the Status column will change to 'Ready' and buttons will appear in the Action column



Using the Hub to complete your facilitator tasks

Notification of an individual session request

- → It is the responsibility of the individual participating in the 360° feedback process to make contact with you to check your availability for a feedback session and to agree a venue, date and time. The individual will contact you by email or telephone to agree this.
- → However, you will receive an email notification once someone has selected you as their facilitator (as below), so if they fail to get in contact with you, you can use the details provided. You will also need to let them know as soon as possible if you are unable to provide the feedback session, so that they can choose another facilitator in good time.



Request My Report	
Back to menu	

→ When the individual clicks Request My Report you will receive a system generated email (see below) informing you that the individual has requested a 360° report from you and that the report is in the processing queue.

Welcome to the Healthcare Leadership Model Appraisal Hub

Faye McNaught (<u>faye.mcnaught@jcaglobal.com</u>) has requested a 360 report from you. The report is in the processing queue and you will be notified by email when it has completed.

Log on to the Healthcare Leadership Model Appraisal Hub to view the status of this report, and of any other reports you have outstanding.

- → You can now log onto the Healthcare Leadership Model Appraisal Hub and either 'Accept' or 'Reject' this request. This measure is put in place just to make sure that if you cannot provide the feedback session, it is obvious whether the individual has chosen someone else in their place.
- Please let them know directly if you receive a request when you have already told the individual that you are not available.

Welcome to your facilitator page

Your feedback reports are split between Individual Feedback and Group Feedback, select the appropriate tab below to view the corresponding requests. In order to facilitate a session you will need to download the completed 360 degree report. For *Group sessions* you will need to accept the request prior to downloading the report.

Please do not mark a session as complete until you have attended the session with the individual or group. Once you have marked a session as complete it will be removed from your list below.

Individual Feedback	Group Feedback View completed				
Name	Email	Telephone	Requested	Status	Action
Alexander Harwood	alex.harwood@jcaglobal.com	N/A	27/10/2015 14:05:57	Waiting processing	Accept Decline

You have completed 1 feedback sessions in the last 12 months.

Please remember you must complete at least 2 feedback sessions in every rolling 12 month period to stay accredited.

Back to menu

- → If you decline the request, the report will be removed from your queue and you will no longer be selected as the facilitator in the individual's account. They can now select someone else.
- → If you choose to decline, you must make sure that you communicate this to the individual directly.

→ If you **accept** the request, the report will begin to **process** in your account and the individual will receive an **email notification** that you have accepted, as below.



Welcome to the Healthcare Leadership Model Appraisal Hub	
A report processing request made at 06/05/2014 15:20:36 for a facilitator session for Anne Sample has succeeded.	
Please click here to log on and retrieve the report.	

→ The individual will also receive a notification to say that their report is ready in your account. These emails will typically follow within a **few minutes** of you accepting.



Welcome to the Healthcare Leadership Model Appraisal Hub

Your facilitator has been notified that your report is ready.

→ You can now log on and download the report.

Notification of a group session request

- → If you, as an accredited Group Facilitator are chosen to facilitate a group session, this request will come from the person who is managing and administrating the group of individuals who will have been set up to complete their individual assessments on the system in a 'batch'.
- → Rather than direct contact with the batch administrator, you will receive an email notification, as below, explaining that you have a request to facilitate a group session and asking you to either accept or decline this request.

	NHS Leadership Academy
Welcome to the Healthcare Leadership Model Appraisal Hub	
Faye McNaught (faye.mcnaught@jcaglobal.com) has invited you to facilitate a 360 group feedback session. Log on to the Healthcare Le be able to accept or decline this invitation.	eadership Model Appraisal Hub where you will

- → To accept or decline this invitation, you will need to log in to your Appraisal Hub account, and click View my facilitator session requests.
- → Click the Group Feedback tab, and you will see the screen below

Welcome to your facilitator page

Your feedback reports are split between Individual Feedback and Group Feedback, select the appropriate tab below to view the corredsponding requests. In order to facilitate a session you will need to download the completed 360 degree report. For *Group sessions* you will need to accept the request prior to downloading the report.

Please do not mark a session as complete until you have attended the session with the individual or group. Once you have marked a session as complete it will be removed from your list below.

Individual Feedbac	Group Feedback View comple	ted		
Name	Email	Telephone	Requested	Status Action
Faye McNaught	faye.mcnaught@jcaglobal.com	N/A	16/04/2015 14:30:08	Ready Accept Decline
ou have compl	eted 1 feedback sessions	in the last 12	2 months.	

Please remember you must complete at least 2 feedback sessions in every rolling 12 month period to stay accredited.



→ To accept the request, simply click the Accept button and to decline it, click the Decline button

→ When you have **accepted** the request, the screen will change to look as below:

Welcome to your facilitator page

Your feedback reports are split between Individual Feedback and Group Feedback, select the appropriate tab below to view the corredsponding requests. In order to facilitate a session you will need to download the completed 360 degree report. For *Group sessions* you will need to accept the request prior to downloading the report.

Please do not mark a session as complete until you have attended the session with the individual or group. Once you have marked a session as complete it will be removed from your list below.

Individual Feedbac	k Group Feedback View comple	eted					
Name	Email	Telephone	Requested	Status	Action		
Faye McNaught	faye.mcnaught@jcaglobal.com	N/A	16/04/2015 14:30:08	Ready	Download	Mark Complete	Resubmit

You have completed 1 feedback sessions in the last 12 months.

Please remember you must complete at least 2 feedback sessions in every rolling 12 month period to stay accredited.





Accessing a 360° Report

- → When an individual or group's 360° report is available, you will be able to download it directly in PDF format from the Appraisal Hub by clicking View my facilitator session requests.
- → You will need to select either the 'Individual feedback' tab or the 'Group feedback' tab, as seen below

Individual Feedback	Group Feedback	View completed			
Name	Email	Telephone	Requested	Status	Action

→ Download the report by clicking the **Download** button.

Name	Email	Telephone	Requested	Completed	Status	Action
Anne Sample	aljobrad@hotmail.com	N/A	01/05/2014 11:48:52		Ready	Download Mark Complete Resubmit
You have co	mpleted 0 feedback	sessions in	the last 12 months.			
Please reme	mber you must comp	lete at least	2 feedback sessio	ns in every r	olling 1	2 month period to stay accredited.
Back	to menu					

- → If a participant informs you that more of their raters have completed since they requested their report from you, you can update the report by clicking the Resubmit button. If the report was requested some time before the feedback session, it is always worth resubmitting the report before you download it for the session.
- ✓ The participant/group is **not able** to download a copy of their 360° report from the Hub and will **not** have seen it before you meet for the facilitated feedback session.

Report Confidentiality

Remember, reports are **strictly confidential** and are **not** to be shared with **anyone** except the participant/group of participants. Similarly, you **should not** keep copies of reports, either in hard copy or electronically, **after** you have held your **session**. They should be **securely disposed of** after you have **given both a paper and electronic copy directly to the participant/s**.

Completing a Session

- → Once you have completed a feedback session with a participant/group, you will need to mark it as complete in your account in order for it to count towards your minimum of two feedback sessions a year.
- → You can mark it as complete by clicking the Mark Complete button in the Action column.
- → Once you have marked a session as complete, it will be removed from your list of upcoming feedback sessions and be moved to your completed list, as shown below. This will also make the report available to the individual in their own account to download.
- → By doing this, you will no longer be able to perform any actions for the report except for download it again. The number of sessions you have completed will increase by one

ame	Email	Telephone	Requested	Туре	Status	Action
aye McNaught	faye.mcnaught@jcaglobal.com	N/A	09/04/2015 11:11:57	Individual	Completed	Download
have comple	ted 1 feedback sessions in th	ne last 12 mont	hs.			
have comple	ted 1 feedback sessions in th	ne last 12 mont	hs.			
have comple	eted 1 feedback sessions in th r vou must complete at least	ne last 12 mont 2 feedback ses	hs.	12 month p	eriod to stav	accredited.

Understanding the 360° Report



This section of the guide describes the 360° report, how it should be interpreted and how the scoring within the report is calculated.

Accessing the 360° report

When a participant's 360° report is available, you will be able to download it directly in **PDF format** from the Healthcare Leadership Model Appraisal Hub. The participant is **not able** to download a copy of their report themselves.

The following pages describe each section of the report.

The Healthcare Leadership Model



This section of the report describes:

- The Healthcare Leadership Model upon which the 360° questionnaire is based.
- Why and how the Model is useful to leaders.
- How the Model caters for personal qualities and how being aware of our strengths and limitations will have a direct effect on how we behave and interact with others. and they with us.

About this report

Anne Sample

About this report

Your Healthcare Leadership Model 360° Individual report collects and evaluates perceptions of your leadership behaviour in the workplace. Ratings are based or your responses and the responses of your raters.

The results give an indication of current performance and provide a platform from which an accurate picture of your strengths and development areas can be built. The information within this report should be treated as confidential to you and your facilitator. You may wish to share the report with others, for example your team, but that is completely your own choice.

How to use this report

his report is based on the **Healthcare Leadership Model** which is made up of nine adership dimensions. Each dimension is presented against five levels of erformance (insufficient, Essential, Proficient, Strong and Exemplary). Your offormance level for each dimension is shown on page 4. Your Performance level for each dimension may be compared agains importance rating on each dimension to your job role. The Importance job role for each dimension is shown on page 4. ormance ratings are based on **Behaviour** feedback from your raters. Bet back has been collated from up to five perspectives: dback has been colleged with an end of the second s our feedback on the nine dimensions is shown from page 6 onwards Important tips: • All feedback is valuable and should be viewed as an opportunity for learning and Feedback is based on perceptions and should be used as a guide for development not an absolute. Work behaviours can be developed. Use the feedback to clarify your current strengths and areas for future development. Please discuss this report with your facilitator. 3

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This section of the report describes:

- How to use the report.
- Tips for participants to consider as they review their feedback.

Your/Group Performance and Importance ratings



This section of the report describes:

- How others have assessed the participant's or group's performance rating for each of the nine dimensions in the Healthcare Leadership Model. The rating provided is the average score across all other rater groups (the participant's self-rating is not included).
- The average performance rating across the healthcare norm group, which is provided for comparison purposes.
- How each rater group has assessed the importance of each dimension to the participant's or group's role.

How the ratings are calculated

Performance ratings

Performance is assessed as being at one of **five levels** – **Exemplary**, **Strong**, **Proficient**, **Essential** or **Insufficient**. These levels are **proportional** to the participant's score on the 1-5 rating scale. In other words, an individual scoring nearer to '1' on average would fall into the **Insufficient** Performance level, and an individual scoring nearer to '5' on average would fall into the **Exemplary** level for any given scale.

Comparison group

The **comparison group score** as shown on the Performance scale represents the **average score** for **all** raters (excluding self raters) who have completed the 360° questionnaire previously. Over time this comparison group will consist of many thousands of individuals across the health and care sector.

Your/Group Performance versus Importance Summary



- Participants/groups can identify priority areas to focus attention on – both during the feedback session and in development planning.
- Performance ratings and Importance ratings for each of the nine Model dimensions are mapped onto a 2x2 matrix, with the vertical axis showing low to high Performance and a horizontal axis showing low to high Importance. Both Performance and Importance ratings are based on average ratings by others (Self rating is excluded).
- Dimensions with low Performance but high Importance are presented in the risk zone (marked in red). The participant/group may want to prioritise their development actions here. Dimensions with moderate Performance and Importance ratings will be shown in the balanced zone (marked in amber). Dimensions with high Performance, but low Importance ratings, are shown in the opportunity zone (marked in green).

Your/Group 360° Overview



- The participant/group can compare their self assessment on the nine leadership dimensions with the average rating of their raters.
- The five point rating scale is described: ratings are of consistency how consistently a given behaviour is demonstrated.

Your/Group Rater Groups



This section of the report:

- Presents in a **table format** average ratings for each of the nine dimensions by the individual's/group's **different rater groups**.
- Enables the participant/s to identify any gaps in perception between themselves and their rater groups.

Your/Group Highest Scoring Items

on
on
1 purpose
service
service
1 purpose

- Displays the five behaviours that received the **highest average rating** from the participant/'s raters (**not** including the individual's self-rating).
- Indicates likely areas of **strength**.

Your/Group Lowest Scoring Items



This section of the report:

- Displays the five behaviours that received the lowest average rating from the participant/'s raters (not including the individuals' self-rating).
- Indicates potential areas for development.

Your/Group Hidden Strengths

	i. Check iters did	asplays up to two benafylours that show the in than you rated yourself. These behaviours m the item analysis pages for more detail, e.g. w you select, were the raters overly positive?	igges cline ence, where clines ay indicate areas of hidden that is the range of scores, how	
Self rating	Avg. rating	Behaviour	360° dimension	
1	3.6	Recognises and actively appreciates each person's unique perspectives and experience	Engaging the team	
1	3.1	Demonstrates that the health and wellbeing of their team are important to them	Leading with care	
1	3	Has the self-confidence to question the way things are done in their area of work	Inspiring shared purpose	
1	3	Creatively applies fresh approaches to improve current ways of working	Evaluating information	
1	3	Avoids jargon and expresses themselves clearly	Influencing for results	
		Self rating Average rat	ing (excludes solf rating)	
		1 - Rarely 2 - Sometimes 3 4 - Usually 5 - Nearly always	8 - Frequently	
		© 2014 NHS Leadership Acader	πy	

- Displays the five behaviours that show the biggest difference in rating where raters have rated the participant/s higher than how they have rated themselves.
- Indicates areas of hidden strength.

Your/Group Blind Spots

or more	r weakn e detail,	esses that others see more presently than you e.g. what is the range of scores, how many ra	ters did you select?					
Self rating	Avg. rating	Behaviour	360° dimension					
5	2.5	Takes positive action to make sure other leaders are taking responsibility for the emotional wellbeing of their teams	Leading with care					
5	3.1	Shares responsibility for colleagues' emotional wellbeing even when they may be junior to those colleagues	Leading with care					
4	2.4	Takes the initiative and responsibility to put things right outside their remit if they see others fearing to act						
5	3.4	Acts flexibly to overcome obstacles	Connecting our service					
5	3.6	Specifies and prioritises what is expected of individuals and the team	Holding to account					
		Self rating Average rational Average rat	ting (excludes self rating)					
		1 - Rarely 2 - Sometimes 4 - Usually 5 - Nearly always	3 - Frequently					

- Displays the five behaviours that show the biggest difference in rating where others have rated the individual/s lower than they rated themselves.
- Indicate the participant/'s blind spots, possibly weaknesses that others see more frequently than they do.

Your/Group Item Analysis

	rating	Avg. rating	Li 1	ne i 2 3	nana 4 5	iger N	Peer 1 2	8 3 4 5	N	Di 1	ect 2 3	rep 4 5	orts N	1	2 3	4 5
Behaves consistently and makes sure others do so even when under pressure	4	4			1		1	2				1 2				
Actively promotes values of service in line with NHS principles	2	3.9			1			2								
Acts as a role model for belief in and commitment to the service	2	3.4			1			2								
Enables colleagues to see the broader meaning in what they do	3	3.3		1												
Supports their team or colleagues when they are challenging the way things are done	3	3.1			1											
Has the self-confidence to question the way things are done in their area of work.		3														
Has the courage to challenge beyond their remit even when it may involve considerable personal risk					1		2									
they see others fearing to act																
What is it? • Valuing a service ethos • Curious about how to improve • Behaving in a way that reflect	service the pri	is and p inciples :	atien and '	t ca valu	re es c	fthe	NHS							THE ST		

- Shows, for each item in the questionnaire, the range of ratings given by the participant/s and their raters. The ratings are presented in order of rating from 1 to 5, 1 representing *Rarely* and 5 representing *Nearly always*. There is one page per dimension.
- Anonymity rules within the Appraisal Hub protect the confidentiality of all raters, except for the Line manager/s. If there are fewer than three peers or direct reports in total, they will not appear in the sections (although their ratings will be included in average ratings). Any rater groups with less than three completions will be moved into the others group. If others still equals less than three. the individual scores will be hidden, but still included in the **averages**. When this has happened, asterisks will appear next to the Peers and Direct reports headings on the page.

Your Rater Comments (Individual Report only)



Appendix – Your Personal Development

(Individual Report only – Group Report contains one page for 'Reflections and Learning')

			Anna Samola			
	Appendix Your personal dev	elonment	care Leadership Model 360°	Thi	s sectio	n of the report provides:
Your highest	Answer the questions below to begin mapping ou Your reflections • "stor" report? 	Anne Sample	. rship Model		 A t t r r k c 	A space for helping the participant/s o reflect on what they have earned about themselves from reading their report and to summarise and capture the key messages from their feedback. A template for the participant/s to begin creating a personal/group development plan .
How can you make mc advantage?	ore use of your strengths to your own and your organisation's					
		Your actio	ns	He	Anne Sample althcare Leadership Model 360*	
Your lowest	scoring items from raters	Action	Support I will need	How I will measure success	By when	
How are areas in which What actions can you	h you are less atrong limiting or hindering your performance take to address your development areas?					
	© 2014 NHS Leadership Academy	Your Healthcare Lead feedback. By sharing y vital information to help Following your discuss development plan.	rship Model 360° Individua our profile with your facilita them support your develop ion with your facilitator, plea	i report provides you with tor, you will be providing t pment. ase update your personal	valuable Ihem with	
		Delivered by JCC Cool www.jcagladel.con	© 2014 NHS Leadersh	p Academy	(38)	

Help and Support

If you'd like further help and support with your 360° questionnaire, please do not 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/#facilitator

Useful Resources

All support and resources, including **user guides**, **sample reports** and **workbooks**, can be found on the Appraisal 360° support page: http://modelsupporthub.jcaglobal.com/

JCA Global

JCA is a **global business psychology** and **people development specialist**. We help organisations achieve **greater success** by getting the best from people in a **sustainable** way. Our integrated **software**, **training** and **consulting** solutions make a proven difference to business **performance**, **engagement** and **well-being**. JCA is proud to be a **customer focused**, **values led** organisation that is passionate about making development accessible to all.

www.jcaglobal.com

