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 self-perception 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: 360support@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, login 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

2. 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.

4. Fill out the form that will appear on screen titled Personal Information, making sure to click or fill in all of 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 within 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

Viewing the Home Screen

Once you have successfully logged into 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.

**What would you like to do?**

- **Start or continue a self/360 questionnaire for YOURSELF**
  - Start a new self or 360 questionnaire
  - Access your existing self questionnaire
  - Access your existing 360 questionnaire to add your raters, choose a facilitator and request your report

- **Purchase or manage multiple 360 questionnaires for OTHERS**
  - Purchase multiple 360 questionnaires for others to complete about themselves (create a batch)
  - Purchase group reports to compare feedback for 2 or more people

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**Managing your session requests**

→ Once you have clicked the **View my facilitator session requests** button, you will be taken to your **facilitator page**.

**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 an individual or group session 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.

You were accredited on: 03/02/2015
Total number of sessions since accredited: 0
Number of sessions completed this year: 0
Please remember you must complete at least 2 feedback sessions in every 12 month period to stay accredited.
→ 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.

→ You will see that the **Status** column shows either ‘**Not yet requested**’ ‘**Being Processed**’ or ‘**Ready**’

→ **Not yet requested** informs you that the individual is yet to submit their report to you

→ **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

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Telephone</th>
<th>Requested</th>
<th>Completed</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alice Sample</td>
<td><a href="mailto:alice.sample@hotmail.com">alice.sample@hotmail.com</a></td>
<td>N/A</td>
<td>01/05/2014 11:45:52</td>
<td></td>
<td>Ready</td>
<td>Download, Mark Complete, Resubmit</td>
</tr>
</tbody>
</table>

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 to stay accredited.

→ **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.
As shown in the screen shot above, you will need to log into your account to accept/decline the request.

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 accept the request, the individual will be automatically notified by the system. You can then monitor the individual’s 360 progress from within your account by clicking View under Action.

Once the individual has completed their self-rating they will need to allow some time for their raters to finish their feedback to complete the 360° process.

It is recommended that the rating process is completed within a period of four weeks but it may be completed quicker or even take longer depending on the number of raters invited and the speed of their response.

Once an individual has received the required number of completed ratings, they will be able to log into their Hub account and click on Request My Report.

When the individual clicks Request My Report you will receive a system generated email (see below) informing you that the individual’s report is available to download.

Notification of a group session request

Please note that there is not currently a Group Report available for the new version questionnaire.

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 administering the group of individuals who will have been set up to complete their individual assessments on the system in a ‘batch’.
Rather than having 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.

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

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:

![Image of the screen with the Group Feedback tab selected and a request for facilitation of a group session, with options to accept or decline the request.]
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

→ Download the report by clicking the Download button.

→ If more of the individual’s raters complete the questionnaire after they have requested their report, you will be contacted via email regarding the update. You will need to log back onto your facilitator page and click the Resubmit button. This will ensure you will be able to present the most up-to-date copy of the report to the individual in their feedback 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.

*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.
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

This section of the report describes:

- How to use the report.
- Tips for participants to consider as they review their feedback.
In this section of the report:

- The participant can compare their self ratings on the nine leadership dimensions with the average rating of their raters.
- The rating will be one of five levels:
  - I – Insufficient
  - E – Essential
  - P – Proficient
  - S – Strong
  - X - Exemplary
Your rater groups

This section of the report:

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

This section of the report:

- Displays in a **visual format** the performance and importance ratings for each of the **nine dimensions** of the Healthcare Leadership Model.
- Presents the participants **self ratings** separately to those of their **raters** to enable you to **compare** and **contrast**.
Your Performance versus Importance summary

In this section of the report:

- Participants 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 hidden strengths and blind spots

In this section of the report:

- The table shows the spread of scores given by the **self rater** and their **raters** for each dimension.

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

- The **blue** circle(s) show the number of raters who gave the **same** rating as the participant. If none of the raters gave the participant the same rating, you will instead see a blue **S** which indicates what the Self rating was.

- The **red** circle(s) show the number of raters who gave the participant a **lower** rating than the participant’s Self rating. Dimensions that have larger red circles, particularly if they are further from the Self rating, may be potential ‘**blind spots**’ and areas for personal development.

- The **green** circle(s) show the number of raters who gave the participant a **higher** rating than the participant’s Self rating. Dimensions that have larger green circles, particularly if they are further from the Self rating, may be potential ‘**hidden strengths**’ that the participant could make greater use of.
Your Performance and Importance analysis

This section of the report:

- Shows the **spread of scores** given by the self rater and all rater groups **against each of the nine dimensions**
- Shows the overall rating for each leadership dimension is shown alongside the number of times a particular rating was given by each rater group.

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 Impact ratings

This section of the report:

● Examines the level of engagement of the participants Direct Reports in relation to the nine Healthcare Leadership Model dimensions.

● Displays the spread of scores given by the self rater and their Direct Reports on each of the nine leadership dimensions plus seven additional items.

Please note: this section will only appear if the participant answered ‘Yes’ to having Direct Reports when completing their own questionnaire.
This section of the report:

- Displays the **free-text comments** provided by the participant’s raters in response 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 verbatim in the individual’s report as **written** by their raters.

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**Your rater comments**

The following comments are made by your 360 feedback raters.

**What do they do well in their role as a leader?**

Sam is very good at bringing on new ideas and sharing the qualities expected from others. Sam is very task focused and an expert in their field, pushing the team to contribute ideas. Very focused on “getting the job done.”

Sam has a great capacity to focus intently on the task in hand without getting distracted. You can rarely find an experienced Sam by the way they articulate information so consistently and confidently.

Encourage me to be better in my own role and to achieve the very best I can.

Great at getting the team focused on tasks and providing clear instructions of how to complete. Sam also sees the opportunities to prepare their teams members to take them forward, rather than just providing answers.

Can be transcription in the words Sam always and clearly is very good at this.

I feel time to be a very passionate colleague, inspires the team with talk of energy and a positive outlook. The team always seem to be ready for any challenges.

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**What do they do less well in their role as a leader?**

They can come across as too direct when speaking to some people.

Very involved in the role of the team in decision-making, which at times may be made.

Sam can sometimes come across as cold, especially when giving team members feedback. Though this comes across as professional, it can be perceived as a lack of warmth and encouragement in more difficult times.

Tends to be quite blunt with the team, although understands this can come across as very direct and often loses morale of the team.

Sam’s high standards and determination can come at the expense of others. Being part of Sam’s team often means taking on an excessive role for someone you don’t always think.

Sam will be the last to admit that they don’t do it. This sometimes means important information is missed because of the focus on the bigger picture which then sometimes leads to bad mutual pressures or hard feelings.

Given that Sam has been trusted, this does seem to impact on the way they connect with others. It often feels that Sam doesn’t really care about what I have to say, they just pretend I get on with my job.

Although Sam is dedicated, they can come across as not particularly warm and sometimes a little cold.

Sam can sometimes lack warmth when communicating with the team. This can have a negative impact as it can seem as if they don’t care for people feelings.
Appendix 1 – Your personal development

This section of the report provides:

- A space for helping the participant to reflect on what they have learned about themselves from reading their report and to summarise and capture the key messages from their feedback.
- A template for the participant to begin creating a personal development plan.
Appendix 2 – The nine dimensions of leadership behaviour

This section of the report provides:

- 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° 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/

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