The Healthcare Leadership Model
Appraisal Hub

Multiple 360° Questionnaires (Batches) & Group Reports User Guide

www.leadershipacademy.nhs.uk
Multiple 360° Questionnaires (Batches) & Group Reports User Guide

Contents

05 Introduction
06 What is a Group Report? / What is a Batch?
07 Accessing the Healthcare Leadership Model Appraisal Hub
11 Creating a Batch
13 Making a Payment
17 Inviting Batch Participants
19 Managing a Batch
22 Managing Completed 360° Questionnaires
23 Creating a Group Report
26 Choosing a Group Facilitator
28 Overview of Report Structure
29 Understanding the Group Report
31 Help and Support

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 behaviour and performance. The hub enables participants to complete a questionnaire based on the Healthcare Leadership Model that evaluates their self-perception of their 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 report will give an indication of the individual’s current leadership performance and behaviour as seen by themselves in comparison with their raters.

→ Through exploration of the report in a dedicated feedback session with their accredited facilitator, they can gain a real insight into their areas of strengths and limitations and begin to construct a development plan from which to enhance their effectiveness as a leader.

Why would someone be asked to complete a Questionnaire?

→ The questionnaire provides an opportunity for individuals and the people they work with to rate their leadership behaviours within the work place. This will help to develop and make sustainable improvements to 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 an increased awareness of both strengths and limitations in the workplace. It can highlight areas where performance may have been overestimated as well as areas that may have been neglected.

Purchasing Multiple 360° Feedback Questionnaires (Batches)

→ The Healthcare Leadership Model Appraisal Hub enables you to purchase single 360° feedback questionnaires, multiple 360° feedback questionnaires (batches) and Group Reports.

→ Creating a batch of 360° questionnaires allows a local coordinator or administrator to buy as many 360° questionnaires as required in one transaction and distribute them throughout a team or group of people.

→ They can pay for this via a purchase order or credit/debit card and can monitor the participants’ progress by logging into the hub.

What should I do if I have any technical difficulties?

Please contact the helpdesk on +44 (0)1242 282 979 or email us: 360°support@jcaglobal.com
What is a Group Report?

→ A Group Report combines the findings from each chosen participant’s 360° report within a batch to create a collective report.

→ This demonstrates the overall performance of the participants and how they work as a team, identifying strengths and areas for development for the group as a whole.

→ Each participant in the batch completes an individual 360° Assessment, complete with raters and a self-assessment. For more detailed information on this process, see the 360° Assessment User Guide.

→ This produces performance data for each individual within the batch, which, when processed as a Group report, is merged with the other individuals to produce an average performance rating.

→ Gaining an insight into the overall performance of a team rather than just individuals encourages development to be planned at a team level, ensuring the group have a cooperative shared goal and a joined-up vision of their development needs.

What is a Batch?

→ Creating a batch of 360° questionnaires allows a coordinator or administrator to pre-pay for as many questionnaires as required in one transaction.

→ The batch can be used for separate participants who require their own individual assessment to be processed as it is, or any number of participants within the same batch can have their assessments collated to create a report of those people as a group (Group Report).

→ If they wish to create a Group Report from the batch at a later date, they have the option purchase Group Reports at a later date.

→ They can then distribute the questionnaires throughout a team or number of individuals by adding them as participants.
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 8.
→ 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 Batch

→ 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**:

To create a batch click on **Purchase or manage multiple 360 questionnaires for OTHERS**.

**Purchasing questionnaires for others: creating a batch**

When you create a batch you will be given the option to pre-pay for any number of colleagues to take part in a 360 degree questionnaire and also pre-pay for group reports.

**Batches** - The cost of creating a Batch is £40+VAT per questionnaire. You can buy any number of questionnaires, and a discount is offered for batches of 60 questionnaire - purchase 60 and you will be invoiced for 50 (i.e. receive 10 free). You will be able to add participants now or later to your batch and monitor their progress.

**Group reports** - The cost of creating a Group Report is £35+VAT per report. In addition to purchasing in advance, Group Reports may be purchased at any time of creating a report.

→ To create a batch click on **Create a batch**.
→ Once you have read the message select the Create a batch option to purchase multiple questionnaires.

→ You will be asked to create a name for your batch of 360° questionnaires and enter the number of participants you wish to take part. This will be visible to participants when they join the batch.

If you wish to create a Group Report from your Batch later on, you have the option here to pre-purchase Group Reports.

→ Click Create.

✓ Note: You must have a minimum of three participants in order to generate a Group Report and you cannot alter the number of places purchased in a batch once it has been created.

✓ You can also add your own tailored message within the invitation email here.
Making a Payment

→ Once you have clicked Create, you will be presented with the payment screen displaying the total amount payable.

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

**Make a payment**
You are required to make a payment for:
3 x 360 degree questionnaires - £120.00 + VAT
1 x Group Reports - £35.00 + VAT
The total amount payable is: £155.00 + VAT

**Paying by Purchase Order**

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

**Pay by purchase order**
Find your organisation details and enter your purchase order number to complete payment

Amount (£)
40 + VAT

Your purchase order number

> Please note - In order to access your 360-report you must enter a valid PO Number.

Search
Cancel purchase

→ 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:

![Search for organisation](image)

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.

![List of organisations](image)

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.
Inviting Batch Participants

→ Once your payment has been processed, you will be presented with a summary of the batch you have created.

→ From here you will be able to invite participants to complete their 360° questionnaires. Select the Set up a participant option.

![Set up a participant](image)

→ The screen below will appear. Fill in the fields with the participant’s details and then select the Save option.

![Set up a participant to undertake a 360 degree questionnaire in Example Batch batch](image)

✓ Note: A batch place is only used up when a participant accepts the invitation to join the batch. Therefore, misspelt or invalid email addresses do not use up a place and can be Removed.
→ After selecting **Save**, you will be taken back to the screen where you can go ahead and **add** all of the other participants that you would like to **include** in the batch.

→ Once you have added your participants, you **must** select the **Send Email** button on the **right hand side** to send the **invitation** to the relevant participants. Without sending this, the participants will **not** be invited to join the batch and will **not** be sent a link to begin their questionnaire.

**Your batch named Example Batch**

This batch has been pre-paid to provide up to 3 questionnaires for participants and 1 group reports.

A batch place is only used when the participant confirms they want to join the group. Misspelt email addresses or inactive users do not use up a place.

→ **Upon clicking **Send Email**, the participant will **receive** the following email:**

→ **Once you have sent the email, the **Send Email** button will change to **Resend Email**. Use this button to **resend** the email if a participant **fails to start** their questionnaire. This email is identical to the one you sent originally.**
Step 4.

Managing a Batch

→ In order to check participant progress within any batches that you have created you can log back into the hub at any point and click on the “Purchase or manage multiple 360 questionnaires for OTHERS” on the main menu:

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 ratings, 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

You will be taken to the following screen where you can view any batches you have created by clicking View alongside the batch which you would like to check progress.

Purchasing questionnaires for others: creating a batch

When you create a batch you will be given the option to pre-pay for any number of colleagues to take part in a 360 degree questionnaire and also pre-pay for group reports.

Batches - The cost of creating a Batch is £40+VAT per questionnaire.
You can buy any number of questionnaires, and a discount is offered for batches of 60 questionnaire - purchase 60 and you will be invoiced for 50 (i.e. receive 10 free).
You will be able to add participants now or later to your batch and monitor their progress.

Group reports - The cost of creating a Group Report is £35+VAT per report.
In addition to purchasing in advance, Group Reports may be purchased at any time of creating a report.

You have created the following batches

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Paid By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example Batch</td>
<td>0 people added</td>
<td>JCA1234 Verified</td>
</tr>
</tbody>
</table>

Create a batch

Back to start
The Status field shows you a brief overview of each participant’s progress. Firstly whether they have completed their self-assessment, once they have done this it will show whether their Line Manager has completed, and once this has been done how many raters have completed, out of how many the participant has added.

You can use the Resend Email option here to send the original invitation email again to any participants who have not started their assessment.

To view each participant’s progress in full, including whether or not they have joined the batch and how their raters are progressing, you can scroll down and click More Detail.

You are also able to Manage Individual reports from this screen:
→ For example, in the screenshot below, you can send reminder emails to raters who have not completed, set the close date for each individual’s report and choose their facilitator if you would like them to choose someone in particular.

**Participant Mira Sordillo**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Surname</th>
<th>Email</th>
<th>Date Registered</th>
<th>Role</th>
<th>Status</th>
<th>Last Email Sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rater 1</td>
<td>Rater 1</td>
<td>Rater 1</td>
<td>26/08/2016 09:52:46</td>
<td>Self</td>
<td>100%</td>
<td>Sent 26/08/2016 09:53:16</td>
</tr>
</tbody>
</table>

Send reminder emails to the participant’s raters that have not yet completed.

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

This questionnaire is due to be completed by Monday, 5 Sep 2016

→ You will also be able to request their reports for them should they need assistance with this. **However**, please note that this is typically managed by the participants themselves so you should always seek approval from the participant first.

→ You can log into The Healthcare Leadership Model Appraisal Hub at any time and **come back** to this screen to check the **status** of your batch participants’ questionnaires.

→ Individuals **cannot** be added to the batch once the chosen number of participants has been reached and they have all **begun** their questionnaires. You **cannot** increase the number of **places** within the batch.

→ However, as stated earlier in this guide, a batch place is **only** used up when a participant **begins** their questionnaire. Therefore, **misspelt** or **invalid** email addresses **do not** use up a place. To update an incorrect email address, simply **Remove** the participant and add the participant again with the correct details.

→ Once you have **at least three** 360° participants with completed questionnaires within a batch, you can create a **group report**.

  → **Note**: A **Group Report can only be created from participants who sit within the same batch**
Managing Completed 360° Questionnaires

When a participant has completed their self-assessment, their Line Manager has completed and they are happy with the amount of raters that have completed, their report is ready to be requested from the Facilitator. The next steps here depend on what you as the administrator intend to do with the batch.

1. If you are simply using the batch to purchase a number of questionnaires for individuals to independently complete, select their facilitator and receive their feedback, then you have no further actions that you need to take.

2. If you have set up the participants as part of a course and you know who they need to choose as their facilitator, you can either choose the facilitator for them by clicking Manage next to their name from within your batch or simply inform them of who to choose and they can do this within their own account.
Step 5.

Creating a Group Report

To create a group report, click Purchase or manage multiple 360 Questionnaires for OTHERS from the Home Screen of the Healthcare Leadership Model Appraisal Hub, as you did when creating a batch. If you have not yet created a batch or logged in, please go back to Step 1 of this guide, on page 7.

Choose your batch from the table and select View, as shown below.

Purchasing questionnaires for others: creating a batch

When you create a batch you will be given the option to pre-pay for any number of colleagues to take part in a 360 degree questionnaire and also pre-pay for group reports. You will be able to add participants to your batch at any time and monitor their progress.

Batches - The cost of creating a batch is £40+VAT per questionnaire. You can buy any number of questionnaires and a discount is offered for batches of 60 questionnaires - when you purchase 60, you will be invoiced for 50 (i.e. receive 10 free). Please note that credit card orders are limited to 49 questionnaires, if you would like to purchase 50 or more by credit card, you will need to contact 360 Support on 01242 282979.

Group Reports - The cost of creating a Group Report is £35+VAT per report.

In addition to purchasing in advance, Group Reports may be purchased at any time during or after the 360 process.

Once you have clicked View, you will be able to see a table (see below) containing all the participants' details, invitation status, completion status, and your possible action buttons.

Once all the participants have completed their 360 questionnaires and either all their raters have also completed or they are happy with the number of raters that have completed, (as seen above in Status column), you are ready to create a Group Report.

To generate the report, simply click the Group Reports button above the table, which will take you to the screen shown on the next page of this guide, or if you have not yet purchased any Group Reports, you will be able to do this with exactly the same steps as you followed in paying for the batch by clicking Purchase more Group Reports.
The **Group Reports** button will **only** appear once **at least 3** participants have completed the **minimum** requirements. If this is not the case, this message will show above the table:

**Group Reports Note:** To set up a Group Report there must be a minimum of 3 participants who have completed their 360 questionnaire. Each of these participants must have invited a minimum of 5 raters who need to have completed their 360 questionnaires. At least 1 of the raters must be a line manager.

Select the **Set up a Group Report** option and enter your **chosen group name**, which can be anything of your choice. The name is used as a **reference** for you and will appear on the finished report.
You will see a table on this screen with all the participants in the batch you created previously.

To add the participants to the group report, select the Add box to the far right (see below). To select all of the participants, simply click Add All at the top of the table.

The Add option will only appear next to a participant’s name if they have completed the minimum requirements; their self-assessment and at least 3 raters have completed, 1 of them being their line manager.

Once you have ticked Add next to every participant you would like to include, click Create Group Report.

Set up a Group Report
Please select the participants you would like to include by ticking the 'Add' box alongside their name.

Sample Group Report

You can add or remove participants from this group. There is no limit to the number of amendments you can make and there will not be any additional charges.

Create group report
Step 6.

Choosing a Group Facilitator

→ You will now need to request a facilitator for the group report. Once you have clicked Create Group Report, you will see your Report in a table (as below), and an option in the table to Choose Facilitator.

Group Reports for Sample Group Report
Number of pre-paid reports: 3
Number of reports created: 2
Number of reports archived: 1
If you require further reports you will need to select the button below.

→ Click this, and then search for a facilitator by name, city or region. Choose them by clicking Select this facilitator, as shown below. You can choose someone you know already, or simply find a facilitator nearby.

→ By selecting Show only group accredited facilitators, you will only be presented with a list of facilitators that are registered to give the group feedback that you need.
→ After you have chosen your facilitator, click the **Send Request** button in the table on the group reports page to **submit** your report to them.

![Group Reports for Sample Group Report](image)

→ The facilitator will receive an **email** with an option to **accept** or **decline** the request.

→ In the **Report** column, the **Send Request** button will change to **Re-send request** and the note in green will appear at the top of the page, notifying you that the report has been submitted to your selected facilitator.

→ If your facilitator does **not** receive the request, you can click **Re-send request** to notify them again.

→ The facilitator can now **access and download** the report.

✓ **Note**: At this point **no further amendments** (adding or removing participants) can be made to the group report. If any raters complete after the facilitator has processed the report, the facilitator has the option in their account to **Resubmit**, which will update these changes. If the facilitator marks the report as **Complete**, the resubmit button will no longer be available, and the report will be closed.

→ Your report is **only accessible** by your facilitator. It is **your** responsibility to contact the facilitator **directly** to arrange a **mutually convenient time and date** for your facilitation session.

→ An option to **Archive** any finished reports is available to enable ease of use and **organisation** within the hub. When a report has been finished with, clicking the **Archive** button will safety store it in your Archive list, should you ever need to access it again in the future.

→ If you wish to purchase more group reports for this batch, click the **Purchase more group reports** button on this page, which will take you to the payment screen as shown previously.
Overview of Report Structure

✓ Note: This overview will outline the structure of a Group Report. For information on the Individual 360° Report for batch participants not being assessed as a Group, please see the 360° Assessment User Guide.

The 360° Group Report is divided into the following sections:

Contents

05 Group 360° overview
06 Group ratings
07 Group Performance and Importance ratings
08 Group Performance versus Importance summary
09 Group hidden strengths and blind spots
10 Group Performance and Importance analysis
12 Group Impact ratings
16 Appendix 1
Reflections and learning
17 Appendix 2
List of respondents
18 Appendix 3
The nine dimensions of leadership behaviour
Understanding the Group Report

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. Group 360° overview
   → Here the group is presented with a diagram that displays its average rating on the nine leadership dimensions of the Healthcare Leadership Model.
   → The group’s average personal ratings are presented separately to the averages of its raters to enable them to compare and contrast.

4. Group Ratings
   → This table displays the average ratings given on each of the 360° dimensions by the different rater groups. This table enables the group to see any gaps in perception between themselves and their raters.

5. Group Performance and Importance Ratings
   → This section of the report displays in a visual format the group’s performance and importance ratings for each of the nine dimensions of the Healthcare Leadership Model.
   → The group’s average personal ratings are presented separately to the averages of their raters to enable them to compare and contrast.

6. Group Performance versus Importance Summary
   → In this section the group is presented with a diagram that displays a summary of its collated ratings by comparing low to high performance against low to high importance. This can demonstrate and in turn improve how the group prioritise its 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). The group may want to prioritise its 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. Group hidden strengths and blind spots

→ The table shows the spread of scores given by all raters and self raters for each dimension. Each coloured circle indicates the percentage of raters who gave that particular rating. The higher the percentage of raters who gave the same rating, the larger the coloured circle will be in that section.

→ The blue circle shows the percentage of raters who gave the same rating as the average self rating. If no raters gave the same rating, you will instead see a blue S to show what the average self rating was.

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

→ The green circle(s) show the percentage of raters who gave a higher rating than the average self ratings. Dimensions that have larger green circles, particularly if they are further from the average self rating, may be potential ‘hidden strengths’ that the group could make greater use of.

8. Group Performance and Importance Analysis

→ This section of the report shows the spread of scores given by the group itself and all rater groups, against each of the nine dimensions.

9. Group Impact ratings

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

→ The table in this section displays the average score given by the individuals and their Direct Reports on each of the nine leadership dimensions plus seven additional items.

→ Please note that this section will only appear if the individuals within the Group Report have answered ‘yes’ to having Direct Reports.

10. Appendix 1: Reflections and learning

→ Here the group is presented with the opportunity to begin mapping out a group development plan based upon reflections of what has been learnt as a team from reading the report.

11. Appendix 2: List of respondents

→ A list of the individuals included in the Group report.

12. Appendix 3: 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/