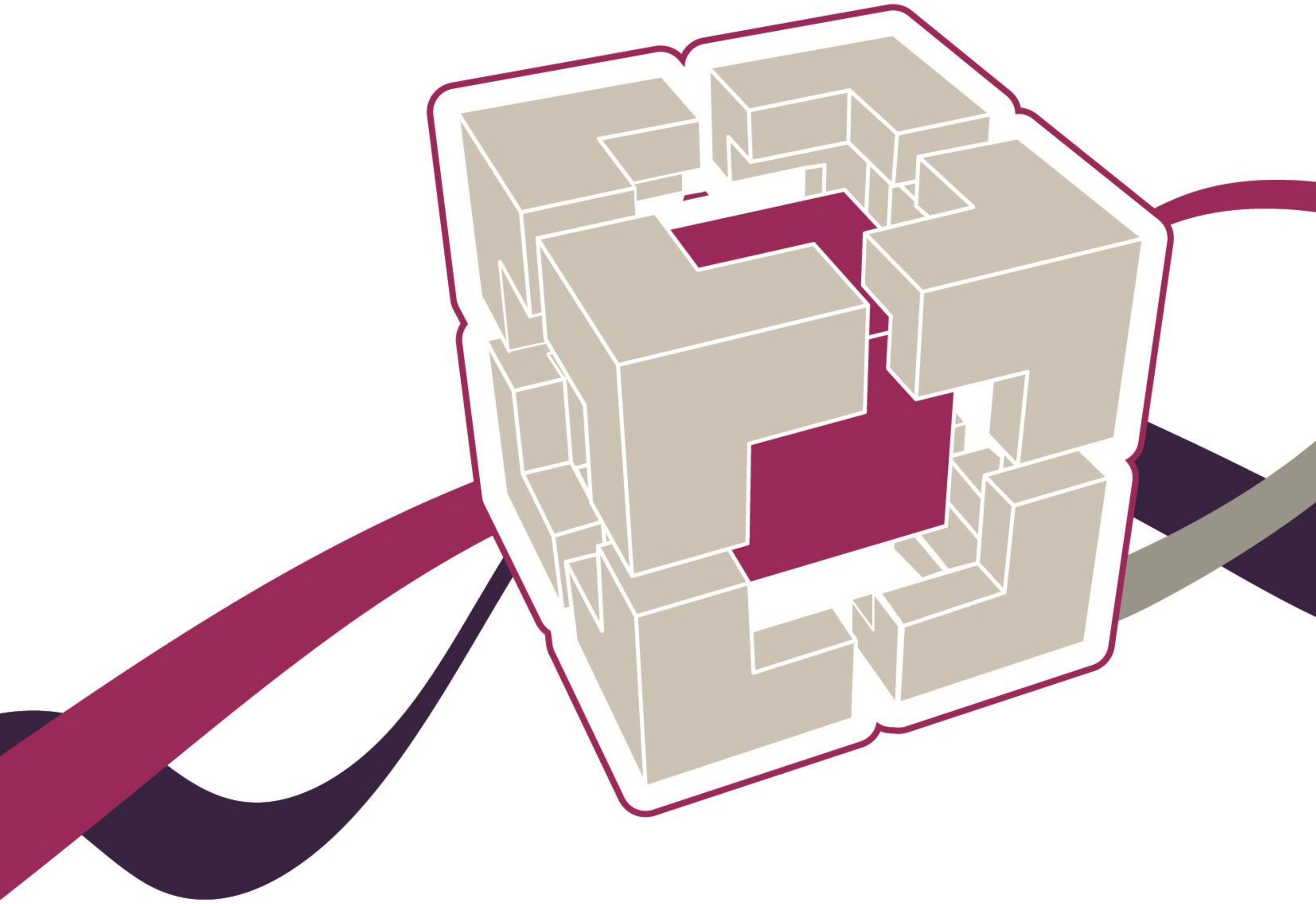
Leadership Academy

Healthcare Leadership Model Group Report

Facilitator Workbook



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Group facilitator workbook

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Introduction

The **Healthcare Leadership Model 360° Group Report** is used with groups or teams. It aggregates the 360° feedback results of individuals within a group and provides insight into how, on average, the group is performing against the nine dimensions in the Healthcare Leadership Model.

Facilitating the feedback of a Group Report is not the same as facilitating individual 360° feedback – the process is different, as are the skills and experience you need as a facilitator.

A trained user in the 360° Individual Report (a facilitator) will have the skills and knowledge to explain the 360° Group Report to an individual; however, they may not have the expertise to facilitate the feedback in a group context. It is therefore recommended that this is done by a person trained in the 360° Group Report, who also has group facilitation skills.

If you would like to discuss this further, then please contact the helpdesk on +44 (0)1242 282 979 or email: 360support@jcaglobal.com

What is the Group Report?

The **Healthcare Leadership Model 360° Individual Report** collects and evaluates perceptions of an individual's leadership behaviour in the workplace. Ratings are based on the individual's responses and the response of their raters. In contrast, The Group Report aggregates and summarises the results of a group of individual 360° reports.

The Group Report

It is important to recognise that the Group Report is not a team report. Feedback is not collected on the performance of the team as a whole. Rather, by aggregating the results of individual team members, the Group Report demonstrates the overall performance of the participants and provides an indication of current team strengths and development areas, on average, across the team.

To enable a Group Report, participants complete the individual 360° assessment as they normally would in the Appraisal Hub. However, these must be administered as part of a 'batch' by a batch co-ordinator, rather than set up by individuals themselves. Individual 360 feedback results within a batch are then merged to create a collective report. Individual results are not identifiable within a Group Report.

Considerations before using the Group Report

Skills and experience

Group Report facilitators need a different set of skills and experiences to individual 360° report facilitators and careful consideration should be given to how the Group Report is going to be managed and used.

The Group Report can be used in several different ways, including:

- Cohorts within programmes
- Team development
- Board development

There are two ways in which Group Reports may be fed back:

1. One-to-one, for instance to the team leader, or an L&D professional if the group is taking part in a broader development programme.
2. To the group or team themselves; teams may be junior/front line teams, or they may be senior management teams/boards of directors.

Group Report facilitators must have the appropriate experience and credibility to work effectively with the group and support as required if any issues arise. The table below summarises the different skills and experience needed.

Skills and experience	Individual feedback		Group Report with junior teams		Group with exec/board teams	
	Essential	Desirable	Essential	Desirable	Essential	Desirable
Passed eLearning assessment	●		●		●	
Completed Group Report eLearning module		●	●		●	
One-to-one facilitation and development experience	●		●		●	
Delivering OD/L&D solutions		●		●		●
Group facilitation		●	●		●	
Formal coaching qualification		●		●		●
Executive coaching		●		●	●	
Working with senior stakeholders including boards		●		●	●	

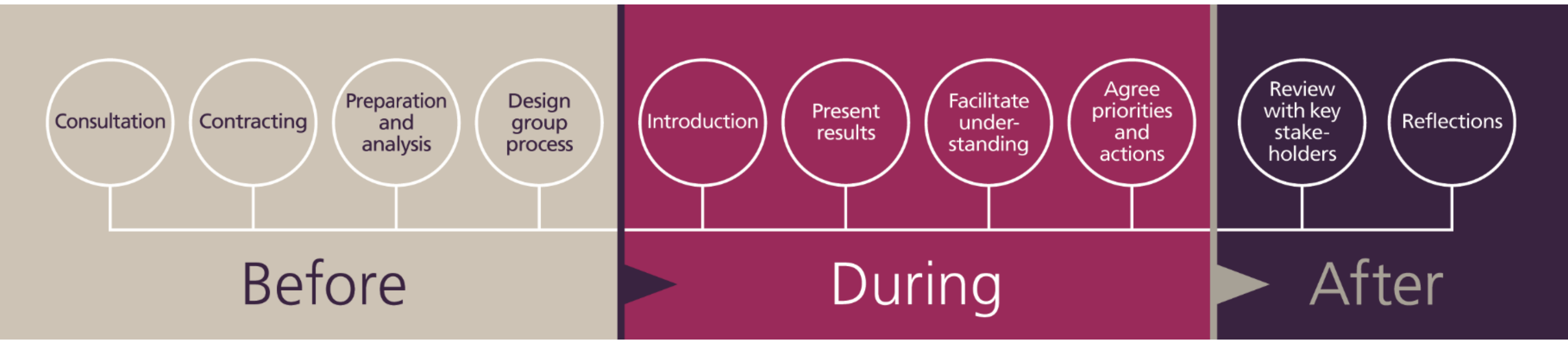
If you do not currently have the necessary skills and experience, you may wish to consider 'buddying up' with somebody who can help you in your development. Supporting a more experienced colleague manage some group feedback sessions will help you build your competence and confidence.

Feeding back to groups – questions to consider

- **Relevant experience and credibility.** It is important to consider your own role as a facilitator in this work and the experience that you have in working with groups. Do you work with any members of this group directly and what impact will this have on your involvement? Do you have the credibility to work with the group and the skills to facilitate the discussions that happen? Are you clear about the purpose of the session and expected outcomes? What other skills do you have that you can bring to this session? (e.g. coach, mediator). How are you going to position your role with the group?
- **For all groups,** it is important to keep in mind whether participants are coming from different organisations/trusts/sectors. Also, do group members have different job roles and are they at the same level? If there are different organisations, roles and levels then greater variety may be expected in the report results – especially when it comes to importance ratings, which may become less relevant.
- **Contracting with the group.** Any 360° feedback process can cause some sort of emotional reaction to the data. Knowing that the feedback process is at a group level can increase the anxiety felt. It is important to get individual buy-in at the start of the process, with clarity around the purpose, how the data will be shared and with whom. Depending on group size and how the session is running, it may be appropriate to consider co-facilitating the session with a second facilitator and to ensure that a clear contract is agreed at the start of the process to ensure a safe yet appropriately challenging climate is created.
- **Cohorts within development programmes.** 360° feedback is often used to help programme developers 'benchmark' participants, either before they begin a programme or early in the process. They may also run (or re-run) the 360° part-way through, at the end, or after a particular period of time once the programme has completed, in order to compare results. Understanding where in the journey the programme participants are undertaking the 360° will be important. It will also be important to understand the overall goals/aims of the programme to help provide wider context for results.
- **Team development.** You will need to understand the motivation for the team undertaking the 360° as a group – is it part of a wider development plan/intervention? Or is this a one-off? What is driving it? It should never be used to discipline a team (or an individual) – it should always be used as a development tool. It may also be useful to consider whether there is a wider development plan/intervention for the organisation – is this the only team taking part? Or are other teams in the organisation doing the same? Similarly, how much of a 'team' is it – do the individuals work closely together? How long have they been working as a 'team'?
- **Board development.** Understanding the motivation for the Board undertaking the 360° as a group will be important. Is it part of a wider development plan/intervention? If so, what other development activities have they undertaken, and over what period of time? Or is this a one-off? What is driving it? Will both Executive and Non-Executive members be taking part? How long have they been working together? They may be a new board who wants to benchmark where they are and highlight their strengths and weaknesses, or a more established board who is working on a longer-term development plan and this is just part of it.

The Group Report interpretation and feedback facilitation process

The process for understanding and interpreting the Group Report is different to how you would feedback the Individual Report. This section describes each of the key stages in the recommended Group Report facilitation process and provides suggestions for how you can approach each stage.



Before the group feedback session

Consultation

At the start of the process it is important to have gained the co-operation of the key stakeholders and what they are hoping to achieve through this process, the rationale for using the Group Report and the background. It is also key at this stage to introduce yourself, your role within the organisation and your role as a facilitator.

We recommend that all participants have had a one-to-one facilitated session prior to receiving the Group Report data, though this does not necessarily need to be with the facilitator of the Group Report. This will allow participants the opportunity to review their own data and understand the detail of the report, as well as giving them a better understanding of the data presented in the Group Report. This also provides an opportunity to understand the broader context of why the Group Report has been requested, individual objectives for the session and anxieties that there may be.

Contracting

On deciding to use the Group Report, all individuals should be communicated with and use of the Group Report should be contracted.

Contracting should include:

- Introducing yourself and your role both within the organisation (if any) and as a facilitator
- Establishing rapport and trust
- Explaining clearly the importance of confidentiality of both the data and the session
- Confirming they are happy to continue with the process and with you as a facilitator
- Clarifying if they have any desired outcomes from the session

Preparation and analysis

Careful preparation increases the likelihood of having a productive feedback session.

Understanding the report

- When the administrator notifies you that the Group Report is ready, you can download the report from the Appraisal Hub.
- Remind yourself of the group's objectives.
- Identify the total number of raters; this may be fairly large, e.g. 10 group members, each with 13 raters, would mean a total of 140 people completing the 360° questionnaire.
- Read through the report to identify themes and patterns; aspects to look out for include:
  - High ratings/low ratings across the report or across different rating groups
  - Links across different model dimensions
  - Differences between average self-ratings and average other ratings
  - Key strengths and development needs
- Remember:
  - Individuals have completed their own 360° and the Group Report results are based on the group aggregate, not feedback on the performance of the group as a whole.
  - The results will identify themes on the group's strengths and development needs.
  - If there are distinct sub-groups within the overall group (e.g. Executive and Non-Executive Directors) it may be worth running two separate reports to enable you to identify differences between them. This will need to be agreed and arranged with the Batch Co-ordinator.

Presenting the data

- How you present the results will depend on who you will be presenting the results to. If it is to an individual (e.g. the OD or L&D lead, or the team leader), then the Group Report may be sufficient. However, it is not likely to be suitable for presentation to the group itself.
- If you are presenting the results to the group, you will need to analyse the Group Report, and create a separate presentation that summarises the key information in a meaningful way.
- On the following page are some suggestions for how you may wish to present the results.

Presenting the data

Overview

- Start the presentation with an overview that summarises all the findings and the high-level messages. A simple 'Red/Amber/Green' status, based on the relative Performance and Importance ratings across the dimensions can be helpful here.
- In this section you could:
  - Broadly define how many of the nine leadership dimensions are Red (high importance-low performance = development opportunity), Amber (meet expectations) and Green (High importance-high performance = relative strengths).
  - Show how many items are Red, Amber and Green.
  - Provide summary 'Observations' and what these mean ('Interpretations') to help the group see the relevance of the finding to them.

Dimension results

Having presented the overview, it is useful to present each of the nine dimensions separately. This gives an opportunity to show:

- Differences between rater groups, e.g. Line Managers rate dimension 'x' higher than Peers.
- Other specifics, e.g. importance ratings were lower on this dimension than all other dimensions.
- When presenting information, be mindful of using appropriate language, e.g. 'dimensions' not 'scales', 'recommendations' not 'requirements', 'indications' not 'absolutes'.

Design the group feedback process

- This involves designing a facilitated session, attended by all group members, in which the group feedback results will be presented.
- Consider which other stakeholders need to be included in the design, communications, and potentially as participants.
- Consider how you will introduce the session and set the scene, including:
  - Purpose of the session
  - Participants' objectives
  - Understanding the current context the group is operating within
  - Agreeing how the group will work together – roles and responsibilities
  - Contracting – confidentiality, what happens to the data after the session, in the unlikely event there are any concerns
  - Clarifying that the focus remains on the group and not on any individual, no individual results will be identified in the analysis; if you feel there could be benefit in referring to individual results (i.e. the Line Manager/Team Leader) then this should be discussed and agreed beforehand with the individual.
  - Encouraging interactivity and requesting the group reflect and comment throughout the process, so they are engaged.
- Decide how you will share the data and activities to support exploration, this may include:
  - Space for reflection
  - Smaller group discussions
  - Problem solving activities
- Think through potential challenges, such as difficult inter-group dynamics.
  - For larger groups, it may be appropriate to have two (or more) facilitators present.
  - It is common for participants to have some sort of emotional reaction to the data. Feedback can feel very personal and as a facilitator your role is to reinforce that it is OK to have an emotional reaction. Reactions can provide you with useful information; it is useful to understand whether the reaction is out of curiosity or defence.
- Consider the broader context of why the 360° Group Report is being completed and any information shared by the Stakeholders.
- Prepare for how decisions will be made on priorities and responsibilities for actions.
- Prepare how you will summarise next steps and close; this could include:
  - Summary of emerging themes and suggestions/commitments.
  - Opportunity for questions.
  - Checking whether agreed objectives have been met.
  - Feedback on the session.
  - Signposting supporting resources available.
  - Checking how the group is feeling.
  - Closing the session on a positive note.
- Consider how suggestions, ideas and actions are going to be recorded throughout the day, such as using post-it notes on a board.

During

Introduction

It is critical to the success of a 360° group feedback session that the participants understand clearly the context in which the 360° is offered and that they are clear on the purpose and process as well as the contracting/confidentiality/agreements in place. Some of these may have been covered when making initial contact or if the participant has had an individual facilitated feedback session, however it is useful to confirm within the group as you conduct the session.

Spending time at the design stage (see above for areas to cover) will mean that the session starts off with the group in the correct mindset.

Present results

Once a clear contract has been established, clearly introduce the tool and present the results to the group. Preparation is key here, showing that you have spent time understanding the data and any patterns that come out.

Use some of the suggestions above (Presenting the data) to ensure that data is provided in a clear and useful format.

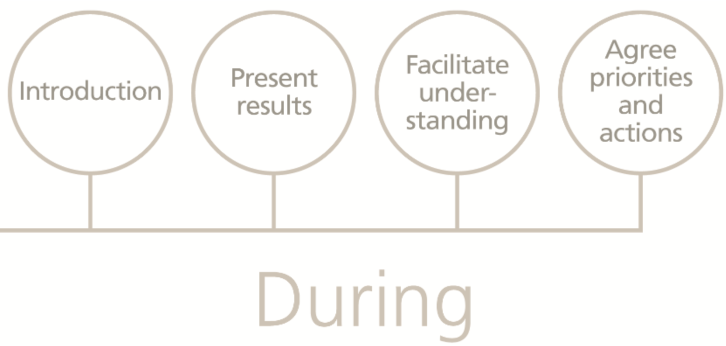
Facilitate understanding

Once the data has been shared, the group need to be given an opportunity to explore and make sense of the data. It is important that you are clear of your role at this stage and that discussions are captured for use after the event.

Agree priorities and responsibilities for actions

Leave enough time at the end of the session to summarise the themes emerging from the report, identify actions and agree next steps. Ideally, you should aim to work with the group to identify two or three key strengths and two to three key weaker areas to focus on and support in their action planning moving forward and commitments to these actions.

At the end of the session, check that the agreed outcomes and objectives for the session have been met. Ensure that the participant is aware of further resources and support available and ask for feedback on the session.



After the group feedback session

Review with key stakeholders

After the session, we recommend reconnecting with key stakeholders to review the data, the session and the agreed outcomes. This is an opportunity to check that stakeholders' objectives have been met and if there is any further support required from you as the facilitator.

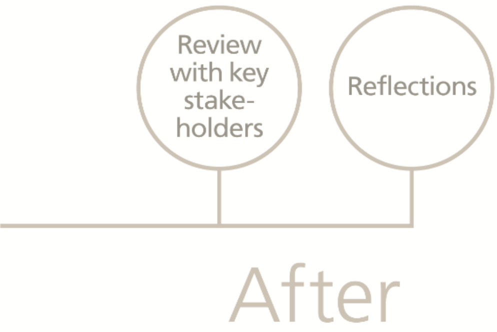
Ask for feedback on your facilitation. This is good practice and is also required for your first two group sessions. An Evaluation form is available to download from the **Appraisal Hub Support** page (http://modelsupporthub.jcaglobal.com/).

Reflections

As a 360° Group Facilitator you should aim to continually develop your skills and your professional practice. One important way of doing this is to spend some time after each feedback session reflecting on how it went.

Some suggestions for how to do this include capturing your thoughts using a reflections workbook or a learning log. Doing this as soon as possible after the feedback session means that you are more likely to learn from the experience and integrate any learning into your facilitation practice. A Reflections log is available to download from the **Appraisal Hub Support** page (http://modelsupporthub.jcaglobal.com/).

- This can be filled in electronically, or you may choose to use your own template.
- When reflecting on your facilitation, consider what went well, less well and what you could do differently next time.
- Also consider what you found challenging and enjoyable.
- Don't forget to add your thoughts and experiences to the **HLM 360 Facilitator Community** on **LinkedIn**, your colleagues may benefit from your reflections: https://www.linkedin.com/groups/8654188/
- When using the LinkedIn community, please make sure you maintain confidentiality and anonymity for both participants, their raters, and any groups they are part of.
- You may also want to find a 'buddy' or create a support network within your region to share learnings and experiences.



Completion

There are a few important tasks for you to complete in the Appraisal Hub after the facilitated session has been completed.

Firstly, you need to email the group/stakeholders as agreed a copy of their report. **Participants are unable to access the report from the Appraisal Hub themselves.** Once you have done this, you should securely dispose of the report – both soft and hard copies, unless it has been agreed with the group for you to keep a copy, e.g. to assist with follow-up sessions or conversations. **Remember the information is confidential and should be treated as such.**

Secondly, you need to record in the Appraisal Hub that you have completed the feedback. This will then add it to your annual total of group feedback sessions.

Thirdly, share any other information, such as summary data created for the session, as appropriate.

Evaluation

It is good practice to ask for feedback on your facilitation. An Evaluation form is available to download from the **Appraisal Hub Support** page (http://modelsupporthub.jcaglobal.com/).

Staying accredited

In order to remain accredited as a Healthcare Leadership Model 360° Group Report facilitator, you are required to complete at least two group feedback sessions in every rolling 12 month period. This is in addition to the two individually facilitated sessions.

Help and support

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

Alternatively, you can visit our support site here: http://modelsupporthub.jcaglobal.com/