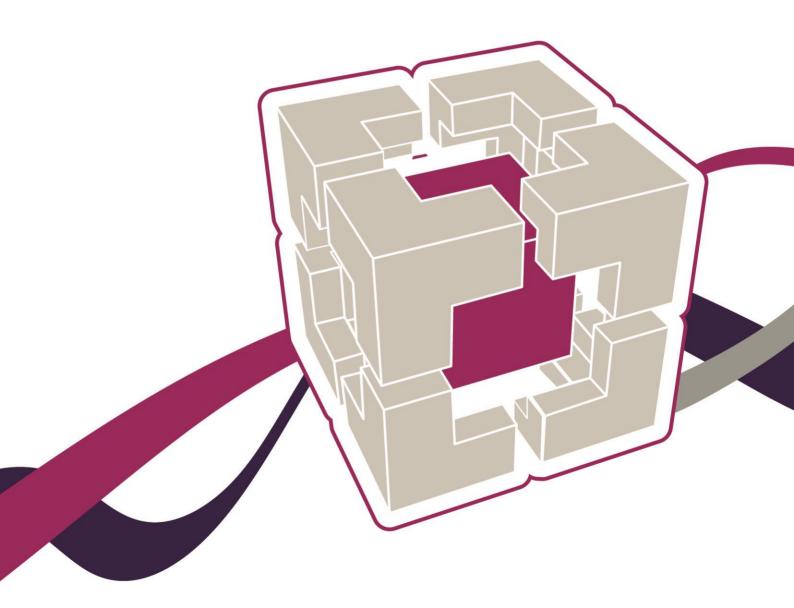


The Healthcare Leadership Model Appraisal Hub

Accessing a Pre-paid 360° Assessment User Guide



Accessing a Pre-paid 360° Assessment User Guide

Contents

- 03 Introduction
- 04 Accessing the Healthcare Leadership Model Appraisal Hub
- 05 Creating a NHSx account and accessing your Questionnaire
- 09 Completing a 360° assessment questionnaire
- 10 Changing the date
- 11 Starting your questionnaire
- 15 Choosing a facilitator
- 17 Choosing some raters
- **21** Requesting your report
- 22 Understanding your 360° assessment report
- 23 Overview of report structure
- 25 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 individual behaviour and performance.
- → The hub enables you to complete a questionnaire based on the Healthcare Leadership Model that evaluates your self-perception of your leadership behaviour in the workplace.
- → Individuals who have chosen to participate in the **360° Questionnaire** will also receive feedback from their '**raters**'; other people (peers, direct reports, line manager, and others) whom they have invited to provide **observation** and **comment** on their leadership **performance** and **behaviour**.
- → The results are presented to you in a **report** which will be provided by an **accredited facilitator** as part of a **dedicated feedback session**.
- → The report will give you an indication of your current leadership performance and behaviour as seen by yourself in comparison with your raters.
- → Through **exploration** of the report with your facilitator, you will gain a real insight into your areas of **strengths** and **limitations** and begin to construct a **development plan** from which to **enhance** your effectiveness as a **leader**.

Why am I being asked to complete this questionnaire?

- → The questionnaire provides an **opportunity** for **you** and the **people you work with** to **rate** your leadership behaviours within your work place. This will help you to **develop** and make **sustainable** improvements to your **performance** at work.
- → The questionnaire can be used to provide a starting point for **discussion** and **increased awareness** at an individual, team or organisational level.
- → The report can provide you with an increased awareness of both your strengths and limitations in the workplace. It can highlight areas where you may have overestimated your performance as well as areas you may have neglected.

What should I do if I have any technical difficulties?

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

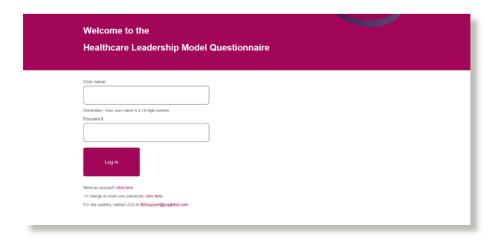
<u>Step 1.</u>

Accessing the Healthcare Leadership Model Appraisal Hub

→ You should, at this stage have your **invitation email**, advising that you have been invited to undertake a **360°questionnaire**. Your invitation will look like the below:



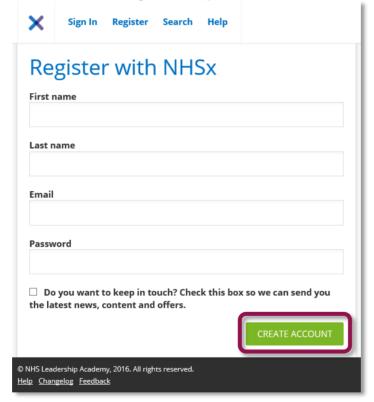
- ✓ Note: If you don't have this email, you will need to contact your group coordinator / batch coordinator.
- → If you have an account already, please log in with your 10 digit username here. If you do not have an account, please select the second link in the invitation email to create one.
- → The link to start your 360° degree questionnaire will take you to the below page.



Step 2.

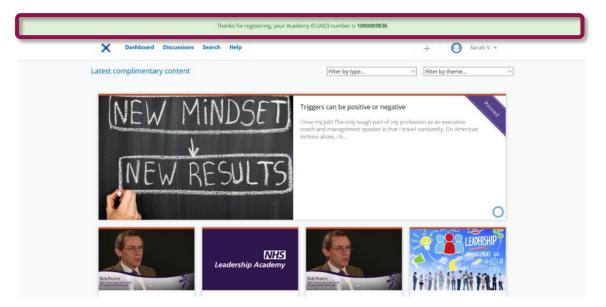
Creating an Account

- → The link to create an account will take you to the page shown below; NHSx is the NHS Leadership Academy platform. You will need to create an account here first and then register for The Healthcare Leadership Model to be taken to the Appraisal Hub
- → You can also go to this address to create an account, it will take you to the same place: https://nhsx.uk/register
- → Create an account using the **form** pictured below:



✓ Note: if this page **does not** appear then you may be **already** logged into an NHSx account, in which case carry on from the instructions on the page 6.

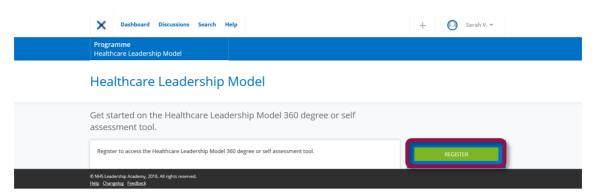
- → You will receive an **email** as below to the address you specified when you created an account, containing your **10-digit number username**.
- → Your username is also specified at the top of the page once you have clicked Create Account (see below)



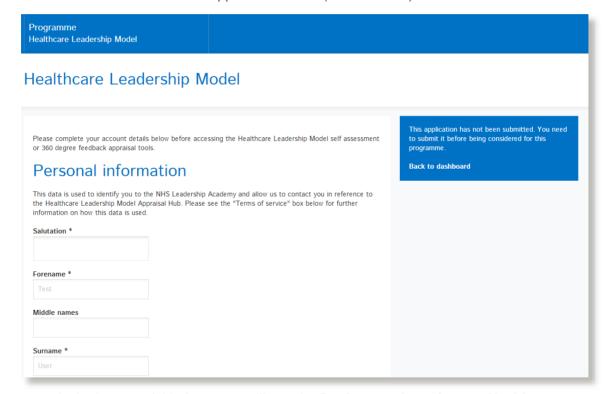
- → If were already registered and logged in, click **Dashboard** at the top of the page and you will be taken to the screen shown below. If you have just created an account, you will already be at this page.
- → You will see **Healthcare Leadership Model** under **All Programmes**. Click **Register** on this programme to sign up.



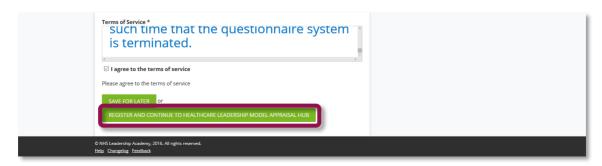
✓ Press Register again to confirm that you would like to access the Healthcare Leadership Model



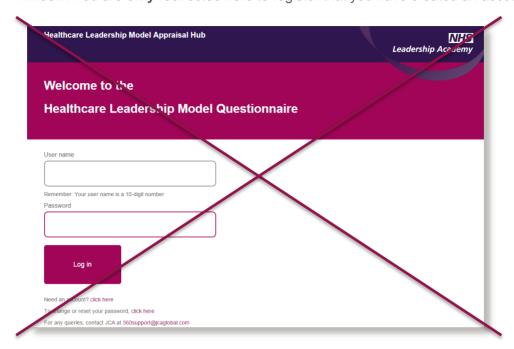
→ Fill out the **form** that will appear on screen (shown below)



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



→ You will then be taken to the **Healthcare Leadership Model Appraisal Hub** log in page (shown below), please **DO NOT** log in here. You will need to **close** this window. You are **only** redirected here to register that you have created an account.



- → At this point, you can now return to your invitation email and click on the first link to Start your 360° degree questionnaire, which will take you to the page pictured above again.
- → Clicking on this link takes you to the correct page where you can enter the assessment by logging in. If you **do not** click on this link, you **will not** be able to enter your pre-paid assessment. You can now **log in** here.
- → This will then ask you to **confirm** that you want to **accept** the invite. Select the **Continue** button and you will then be taken straight into your questionnaire menu.

Accept Sarah's invite to complete your 360 degree assessment.

Sarah would like you to take part in their group questionnaire by completing a 360 questionnaire

By choosing 'Continue' you -

- · Will automatically be able to create a pre-paid 360 degree questionnaire.
- Can invite your line manager(s), peers, direct reports and others to rate you.
- · Are giving your consent for the results of your 360 degree questionnaire to be combined annonymously with others to create one or more group reports.



<u>Step 3.</u>

Completing a 360° Assessment Questionnaire

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

This is your questionnaire created on 25 Aug 2016

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

Change this date

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

Choose facilitator

You have not started your questionnaire

Start my questionnaire

You have not selected any raters for your questionnaire

Choose some raters

Your reports will become available from your facilitator once you have completed your questionnaire.

Back to men

Step 4.

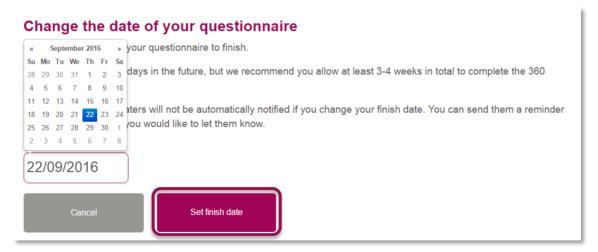
Changing the Date

- → This option enables you to change your proposed 360 Questionnaire completion date which in turn will change the **completion date** shown on the **emails** your raters receive.
- → However, there will be **no** indication of a date change automatically **sent** to raters, you will have to do this by selecting **Resend Email** on the **rater screen**.
- → It is also important to note that nothing 'happens' if you miss your finish date. It has no significance other than to set the date for the auto reminder and completion emails to go out.

Change the date of your questionnaire Choose a new time for your questionnaire to finish. This must be at least 2 days in the future, but we recommend you allow at least 3-4 weeks in total to complete the 360 process Please note that your raters will not be automatically notified if you change your finish date. You can send them a reminder from your rater page if you would like to let them know. Finish Date 22/09/2016

→ Once you click on the date it will bring up a calendar to select the date from.

Set finish date



→ Then press **Set finish date**.

<u>Step 5.</u>

Starting your Questionnaire

- → After clicking on **Start my questionnaire**, you will be asked **nine questions** based on the **nine dimensions** of the Healthcare Leadership Model.
- → If you have **Direct Reports** you will also be asked to answer a set of **34 questions** about the team you lead.
- → The questionnaire should take approximately **15 to 30 minutes** to complete. However, if you are unable to complete the questionnaire in one sitting, you can log out and log in at a later date to **continue** from the point at which you left.
- → Throughout the questionnaire, you will be asked to select a level which accurately describes your behaviour and also to rate the importance of each dimension to your job role.
- → Please note that there are **no better or worse answers**, and the level of behaviour and rate of importance will vary **depending** on the requirements or limitations of **your specific job role**. Try to provide your most **natural** responses to the questions.

Before you start your questionnaire, you will be asked if you have any **Direct Reports.**



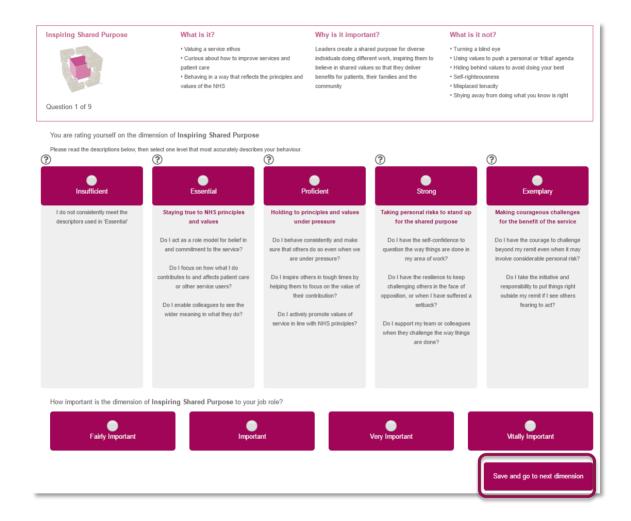
If you have directs reports, there are some additional questions for you to complete.

*A Direct Report is an individual for whom you have a direct responsibility to lead.

For questions related to the nine dimensions, you are given a brief description of the dimension to read. Then, each question consists of two parts.

- → For the first part, please read the descriptions and select the option that **best describes your behaviour** in relation to this dimension.
- → For the second part, you are asked to **rate how important** the dimension is to your job role.

One you have selected your answers, click Save and go to the next dimension.



→ Once you have answered all the questions, you will be asked to confirm your ratings. You will be able to see the answers you have given for each question on a summary page and amend them if needed. Once happy with your answers click the **Next** button at the bottom of the Summary page.

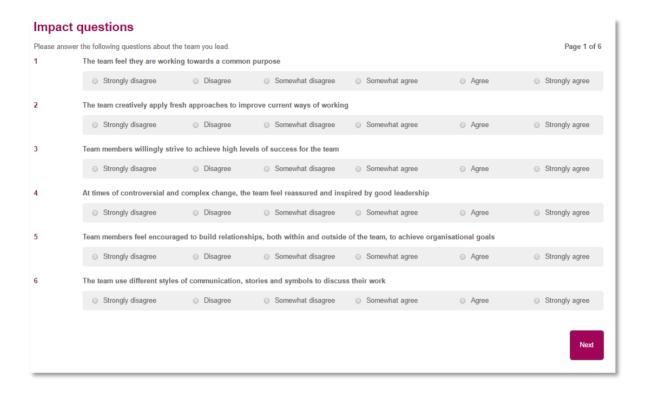
If you are happy with your responses, please continue to the next section. Your responses to this section will then be saved and may not be changed.

Next

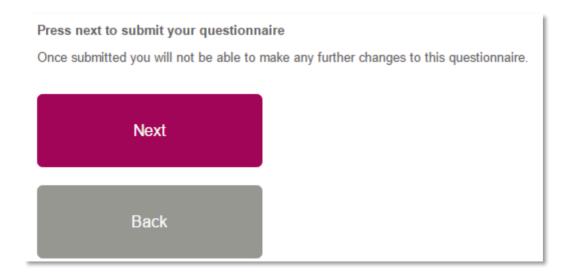
Back

→ You will then have the option to click **Next** to continue or go back and amend your answers. Once you click **Next** you will not be able to return to this section.

If you answered **Yes** to having **Direct Reports** you will now be asked a series of **Impact questions** about the team you lead.



→ Once you have answered all the questions, you will be asked to submit your questionnaire. You can click the **Next** button to submit or the **back** button to go back and make any changes.



- → You will now receive a message screen informing you that the questionnaire is complete and asking you to select your raters and facilitator if you have not already done so.
- → You will also be asked to answer a few evaluation questions about the service. This will only take a few minutes. If you wish to answer these questions you can click on the **Next** button
- → If you prefer not to complete these questions, please click on the link provided which will take you to request your report.

Questionnaire complete

Thank you - you have successfully submitted your questionnaire

What happens next?

We would also like to ask you a few questions to help us evaluate the service we offer. This should take just a few minutes and we would really appreciate your feedback. Please click **Next** to begin. If you would prefer not to complete the questions, click here which will give you the option to request your report. Please note that you will still be able to request your report after completing the evaluation questions.



→ At the end of the evaluation questions there is a Next button to submit these answers.

Thank you for your feedback

By clicking Next your responses to these evaluation questions will be submitted, once submitted you cannot return to this page.

Next

Step 6.

Choosing a Facilitator

→ You will need to select a facilitator in order to receive your report which will be presented to you as part of a dedicated feedback session.

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

Choose facilitator

- → Through exploration of the report with your facilitator, you will gain a real **insight** into your areas of **strengths** and **limitations** and begin to construct a **development plan** from which to **enhance** your effectiveness as a leader.
- → You will be presented with a screen requesting you to **Select Facilitator**.
- → If you **know** the facilitator you would like to choose, enter their surname (or part of) into the **Surname starts with** field.
- → If you **do not** know a facilitator, select a region in the drop down menu to find a list of facilitators in the region most **convenient** for your feedback session. Click **Search**.

Select Facilitator Search for and select a facilitator through whom you will receive your facilitated conversation and report. You will receive your report from your facilitator during your feedback session. Please contact your selected facilitator directly to ensure they are available before requesting your report. You can return here and change your selected facilitator at any time. Surname starts with Region Any Click here to see a region map Search Filter your results by clicking on any of the column headings below Use the search fields to find a facilitator near you

- → A list of facilitators will appear based on your search criteria. You can click on the column headings to sort by city or organisation to help you search. You can then choose a facilitator by clicking the Select this facilitator button that will be displayed on the right hand side of the screen, next to the facilitator of your choice.
- → The facilitator will then be notified **automatically** by the system of your request.
- → Please note that it is still **your** responsibility to contact the facilitator **directly** to arrange a mutually convenient time and date for your facilitation session.

<u>Step 7.</u>

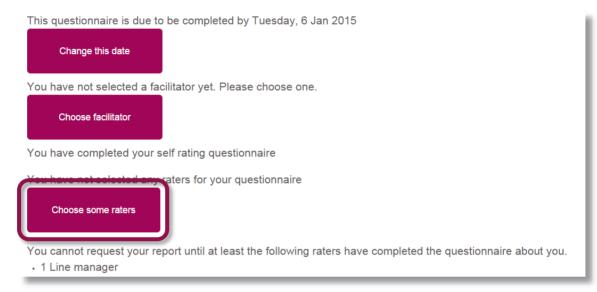
Choosing Some Raters

- → The 360 Questionnaire enables you to invite **anyone** within your work environment to provide you with **feedback** on your performance and behaviour as a leader. The people you choose to invite are known as **'raters'**.
- → The raters will complete the same questionnaire (with you in mind) that you have completed and an additional four free-text questions. We recommend that you add between 10 and 15 raters.
- → Direct Reports will also be asked to answer a set of 34 questions about the team you lead.
- → Their comments in the four free-text questions will be printed in your report exactly as written. The four free-text questions are as follows:
 - 1. What do they do well in their role as a leader?
 - 2. What do they do less well in their role as a leader?
 - 3. How could they improve in their role as a leader?
 - 4. What other advice could you offer them?

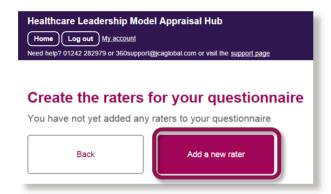
Rater Categories

- → The raters you choose will fall into the following categories:
 - Line manager: the person to whom you report. This category is mandatory.
 - Peers: colleagues and **fellow team members**, probably at a similar job level, with whom you work.
 - Direct reports: those for whom you have a direct responsibility to lead.
 - Others: anyone else you would like to receive feedback from.

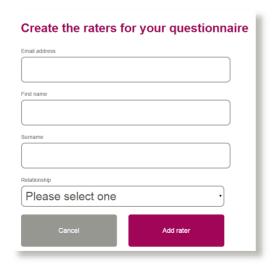
→ Click **Choose some raters** to invite people to rate you.



→ Select Add a new rater



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



- → Please ensure email addresses are **correct**, as the system is unable to verify these for you.
- → Click Add Rater. You will be taken back to the previous screen.
- → To send their invitations Click **Send Email** alongside each rater.



- → Your chosen Rater will then receive a **system-generated email** describing the process you are inviting them to take part in and a **link** to the Healthcare Leadership Model Appraisal Hub to enable them to begin rating you.
- → Without sending this email, your Rater will **not** be aware that you have chosen them and will be **unable** to begin the process
- → Within the questionnaire home screen, there is a **status** for each rater (as seen below) which will **update** accordingly as they complete their ratings of you.
 - o When they have rated you it will be marked as Completed.
 - You can also send **reminders** to your raters by clicking on the **Resend Email** button. The system will also send a reminder **automatically** when **50%** of your completion time is **remaining**.



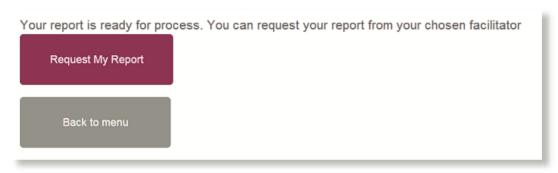
Rater Anonymity

- → The ratings and comments from your raters are presented **anonymously** in your report. The **only** visible description of the rater will be their **relationship to you** (Line manager, Peer, Direct report, Others).
- → However, as most people only have **one** Line manager and your Line manager **must** rate you before you can request your report, your Line manager's ratings and comments **will** be identifiable in your report.
- → It is **recommended** that you choose **at least three** peers and **three** direct reports as raters, although this is optional.
- → If there are **fewer than three** raters in either 'Peers' or 'Direct reports', these will be **disguised** by **moving** them into the 'Others' group. If 'Others' **still** contains fewer than three raters then 'Direct Reports' will **also** be moved into this group. This means that the reader **cannot recognise** any individual's input, which would be easy to do with one or two raters for each relationship.

Step 8.

Requesting Your Report

- → Once you have completed **all** of the above steps and **at least one Line manager** has finished rating you, the **Request My Report** button will appear. Click this **only** when you are happy that no one else needs to rate you.
- → If you would like your raters to have **additional time** to complete their ratings, you can change your completion date to allow them to do this.
- → Clicking the **Request My Report** button will send it to your chosen facilitator, ready for your face to face session.



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

Understanding your 360 Assessment Report

→ You will receive your 360 Report as part of a dedicated feedback session with the accredited facilitator of your choice.





The 360 report is divided into the following sections:

- The Healthcare Leadership Model
- About this report
- Your 360° overview
- Your rater groups
- Your Performance and Importance ratings
- Your Performance versus Importance summary
- Your hidden strengths and blind spots
- Your Performance and Importance analysis
- Your Impact ratings*
- Your rater comments
- Appendix 1: Your personal development
- Appendix 2: The nine dimensions of leadership behaviour

^{*}Your Impact ratings will only appear if you have answered 'Yes' to having Direct Reports when completing your questionnaire

Overview of Report Structure

1. The Healthcare Leadership Model

- → This section of the report **describes** the Healthcare Leadership Model upon which the 360 Assessment is based and explains **why** and **how** it is useful to leaders.
- → This section also covers **personal qualities** and how being **aware** of our **strengths** and **limitations** will have a **direct effect** on how we behave and interact with others.

2. About this report

→ Here you will gain an **overview** of the report itself, how to use it and your next steps.

3. Your 360° overview

- → Here you are presented with a **diagram** that displays your **average rating** on the nine leadership dimensions of the Healthcare Leadership Model.
- → Your personal ratings are presented separately to those of your raters to enable you to compare and contrast.

4. Your rater groups

→ The table in this section displays the **average** ratings given on each of the 360° dimensions by your different rater groups. This table enables you to see any gaps in perception between yourself and your rater groups.

5. Your Performance and Importance ratings

- → This section of the report displays in a visual format your Performance and Importance ratings for each of the nine dimensions of the Healthcare Leadership Model.
- → Your personal ratings are presented separately to those of your raters to enable you to compare and contrast.

6. Your Performance versus Importance summary

- → In this section you are presented with a **diagram** that displays a **summary** of your ratings by comparing low to high **Performance** against low to high **Importance**. This can demonstrate and in turn improve how you **prioritise** your development focus
- → Ratings that align with low Performance on dimensions that are of high Importance will be shown in the risk area (marked in red). You may want to prioritise your development actions here.
- → Ratings that align in **similar** positions against Performance and Importance will be shown in the **balanced** area (marked in **amber**).
- → Ratings that align with high Performance on dimensions that are of low Importance will be shown in the opportunity area (marked in green).

7. Your hidden strengths and blind spots

- → The table in this section shows the spread of scores given by yourself and your raters for each dimension.
- → Each coloured circle indicates the **number of raters** who gave you that particular rating. The more people who gave you the same rating, the larger the coloured circle will be in that section.

8. Your Performance and Importance analysis

→ This section of the report shows you the **spread of scores** given by yourself and all rater groups **against each of the nine dimensions**.

9. Your Impact ratings

- → This section of the report examines the level of engagement by your Direct Reports in relation to the nine Healthcare Leadership Model dimensions.
- → The table in this section displays the spread of scores given by yourself and your Direct Reports on each of the nine leadership dimensions plus seven additional items.
- → Please note that this section will only appear if you have answered 'Yes' to having Direct Reports when completing your questionnaire.

10. Your rater comments

- → This section displays the **free-text** comments provided by your 360 feedback raters in answer to the following **four** questions:
 - 1. What do they do well in their role as a leader?
 - 2. What do they do less well in their role as a leader?
 - 3. How could they improve in their role as a leader?
 - 4. What other advice could you offer them?
- → These comments are presented in your report **as written** by your raters.

11. Appendix 1: Your personal development

→ Here you are presented with the opportunity to begin mapping out a personal development plan based upon your reflections of what you have learned about yourself from reading your report.

12. Appendix 2: 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 360°support@jcaglobal.com.

Alternatively, you can view **Frequently Asked Questions** by following this link: http://modelfaq.jcaglobal.com/

