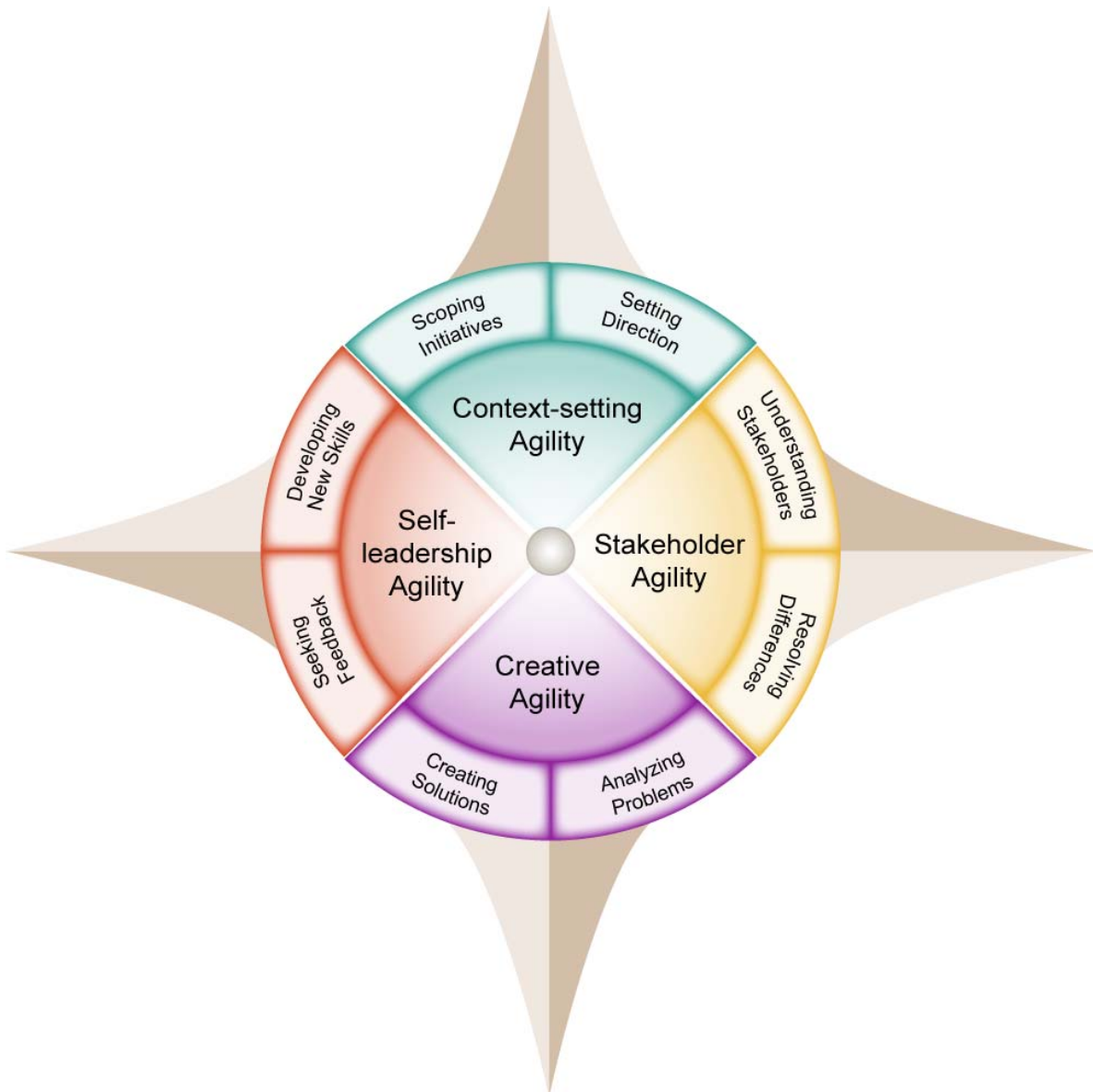


Leadership Agility[®] 360 Technical Manual



Revised 3/12/2015

Table of Contents

Introduction	1
What Is the Leadership Agility 360™?	2
What it Measures	
Three Levels of Leadership Agility	
Four Types of Leadership Agility	
The Leadership Agility Compass	
Instrument Design.....	4
Items and Dimensions	
Unique Rating Process	
Computation of Scores	
Feedback Reports and Support Materials	
Basic Statistics and Norms	6
Respondent Demographics	
Norms for Agility Scores	
Distribution of Leadership Agility Scores	
Reliability and Validity.....	11
Scale Properties	
Concurrent Validity	
Differences by Gender, Age and Race/Ethnic Origin	12
Differences by Job Conditions and Leadership Challenges.....	13

Introduction

The ChangeWise Leadership Agility 360™ is based on extensive research conducted while writing the award-winning book, [Leadership Agility](#), by Bill Joiner and Stephen Josephs¹. As defined by this body of research, leadership agility is the “master competency” needed to make wise decisions and take effective action amid complex and rapidly changing conditions.

The Leadership Agility 360™ (LA360) is a feedback and development tool ideally designed for managers who have direct reports and have responsibilities that include leadership of organizational change or improvement projects. In the hands of coaches certified to use this instrument, the Leadership Agility 360 has proven to be a valuable aid in the development of leaders, teams, and organizations, helping them to increase their agility and effectiveness.

A Leadership Agility Bench-Strength Assessment™ using the same questions found in the LA360 can serve as a gauge of the readiness of an organization’s leadership bench as a whole to tackle the leadership challenges inherent in today’s complex, rapidly changing business environment.

The purpose of this Technical Manual is to:

- Introduce the basic concepts in the framework underlying the LA360.
- Describe how this framework has been translated into a 360-degree assessment instrument
- Document the statistical properties of the instrument for validity considerations.
- Present normative data that can be used to compare individual results with results from a diverse sample of feedback recipients and respondents.

¹ San Francisco: Jossey-Bass, 2007.

What Is the Leadership Agility 360?

The ChangeWise Leadership Agility 360™, developed in partnership with Cambria Consulting, is the only online feedback tool that assesses a manager's level of leadership agility.

WHAT IT MEASURES

The Leadership Agility 360 assesses an individual's level of agility in three "Action Arenas":

- **Leading organizational change:** initiatives to improve an organization and/or its relationship with its larger environment
- **Improving team performance:** initiatives to improve a team and/or its relationship with its larger environment
- **Engaging in pivotal conversations:** person-to-person discussions with important outcomes at stake

Joiner and Josephs' in-depth research has shown that, in today's turbulent economy, increased agility is the key to sustained effectiveness in all three of these key Action Arenas.

The current release of the Leadership Agility 360 features Cambria's exclusive Comparative Rating process, which enables feedback providers to assess the leadership agility of multiple individuals more efficiently and effectively. For example, managers who want to assess several direct reports can do so all at once instead of one at a time. This ability to visually compare multiple individuals against the same questions not only requires 50 to 70 percent less time, it also provides more accurate assessments, higher completion rates, and less rater fatigue.

THREE LEVELS OF LEADERSHIP AGILITY

The Leadership Agility 360 identifies where managers are in their development from tactical problem-solvers into strategic managers, and then into visionary leaders. Extensive research has shown that managers develop through these three agility levels in a sequential manner, always retaining the capacities and skills they gained at previous levels:

- **Expert:** Individuals who operate at this level of agility use their technical and functional expertise to make tactical organizational improvements, supervise teams, identify and solve key problems, and sell their solutions to others. Research indicates that about 45% of today's managers operate at this level.
- **Achiever:** Those who function at this level of agility set clear organizational objectives, lead strategic change, motivate and orchestrate team performance, and engage in challenging cross-boundary conversations. About 35% of today's managers operate at this level.
- **Catalyst:** Those rare individuals who have developed this level of agility are visionaries who can lead transformative change, develop high participation teams, and collaborate with others to develop creative, high-leverage solutions to tough organizational issues. About 10% of today's managers operate at this level.

As change accelerates and the world continues to become more complex, the need increases for more Experts to become Achievers and for more Achievers to become Catalysts. The Leadership Agility 360 is a critical tool for both sizing and addressing these developmental challenges.

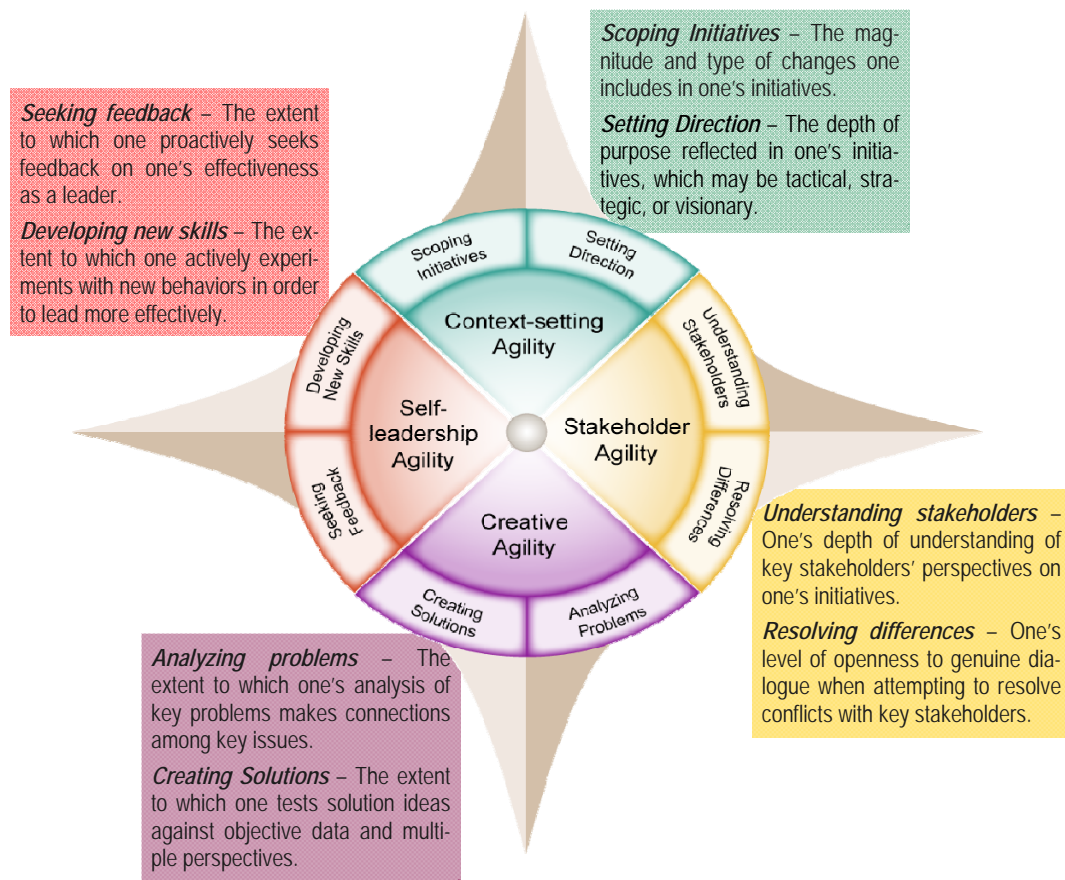
FOUR TYPES OF LEADERSHIP AGILITY

Leadership Agility is a multidimensional competency that includes four mutually reinforcing types of agility, which can be exercised within each of the three Action Arenas identified above:

- **Context-setting agility:** the ability to scan your environment, frame the initiatives you need to take, and clarify the outcomes you need to achieve.
- **Stakeholder agility:** the ability to engage with key stakeholders in ways that build support for your initiatives.
- **Creative agility:** the ability to transform the problems you encounter into the results you need.
- **Self-leadership agility:** the ability to use your initiatives as opportunities to develop into the kind of leader you want to be.

THE LEADERSHIP AGILITY COMPASS™

The Leadership Agility Compass, shown below, provides a way to visualize these four types of agility. The outer circle represents the leadership practices associated with each competency. The Leadership Agility 360 assesses these eight practices in each of the three Action Arenas:



Instrument Design

ITEMS AND DIMENSIONS

The Leadership Agility 360™ is an online assessment instrument with 24 Leadership Agility practices, each represented on a 9-point behaviorally-anchored rating scale (BARS). These items are designed to measure behavior in each of the three “Action Arenas” or leadership contexts (8 items per arena) that our research has found to have significant impact on leader effectiveness:

The instrument consists of a self-assessment and an assessment by others: primary manager, secondary manager, direct reports, and other stakeholders. Feedback recipients are encouraged to choose raters who are in the best position to provide meaningful feedback. In addition to numerical ratings, feedback providers are also asked to provide qualitative feedback – written comments on perceived strengths and development needs.

UNIQUE RATING PROCESS

The Leadership Agility 360 requires feedback providers to review three different descriptions of each of the 24 practices, where each description represents a different agility level. Rather than simply using a continuum or sliding scale, feedback providers are instructed as follows:

- Think about specific times when he/she observed the person leading an organizational change, working to improve the performance of a team, or engaging in a pivotal conversation.
- **Describe the typical approach** the person takes with these examples in mind.
- Read all three "behavioral descriptions" for the item, and decide on the **one behavior** that characterizes how the person typically acts.
- Rate how **effectively** the person demonstrates the selected behavior (low, medium or high).

This process produces ratings with different distribution properties than the typical Likert or behaviorally-anchored rating scale. To calculate scores that best represent an individual's overall Leadership Agility level (e.g., by Action Arena), both the frequency distributions of ratings and the numerical values associated with each point on the 9-point scale are taken into account. One beneficial outcome of this rating process, as will be shown later in this document, is the absence of halo effects and skewness in responses by feedback providers. Also noteworthy is an absence of race, gender, or age-related bias.

COMPUTATION OF SCORES

As noted above, each leadership arena is represented by eight practices. In most circumstances, scores for each Action Arena would be computed as the average of the individual ratings. However, due to the unique nature of the way each item is rated, average scores systematically overstate the individual's level of agility. To correct for this, rather than computing each feedback provider's average scores, scores for the Action Arenas are calculated as the **median** of the eight ratings given by each feedback provider. Scores for groups of respondents (i.e., direct reports and other stakeholders) are calculated as the average of the median scores given by individuals in each group.

Overall Leadership Agility scores are calculated for each respondent group as the median of scores on all 24 leadership practices for single respondents (e.g., self, direct manager, and

secondary manager) and as the average of the median scores for groups with multiple respondents (direct reports and other stakeholders).

In addition to these scores, an Overall Leadership Agility score is shown in the feedback reports. (This score includes the responses from all feedback providers except for the self-assessment and is therefore labeled the “All Others” score.) One way to calculate this score would be to average the median scores from all feedback providers. However, this would result in weighting the responses of each person equally, regardless of their role with respect to the feedback recipient. Our experience with the instrument has shown that respondent groups often differ in the nature of their interactions with the feedback recipient. For example, a manager could be seen as an Expert by his/her direct reports, an Achiever by his/her peers and other stakeholders, and as a Catalyst by his/her direct manager. Simply weighing the scores from all respondents equally would represent this individual as an Expert/Achiever, whereas averaging the scores from each stakeholder group would represent the person as an Achiever, on average.

This raises an additional point regarding how the “All Others” score should be interpreted. Average scores, no matter how they are calculated, are somewhat misleading and are only point estimates of central tendency. One should consider the range of scores from different perspectives/observers to understand what the data are revealing about an individual’s level of leadership agility in different contexts and arenas.

FEEDBACK REPORTS AND SUPPORT MATERIALS

A Feedback Report of innovative design (see excerpt in the Appendix) provides summary feedback on overall leadership agility and summary results from each Action Arena, along with written feedback for each arena. The Report then provides feedback on each of the 24 leadership practices organized by Action Arena.

Feedback recipients also receive a Development Planner that helps them identify their key leadership initiatives, translate their feedback into actionable insights, and formulate a Leadership Development Action Plan that will build on their strengths and lead to desired improvements. A companion Coach Workbook is provided to aid the feedback recipient’s certified coach in helping them work through their feedback.

Basic Statistics and Norms

RESPONDENT DEMOGRAPHICS

As of February 2013, 864 leaders participated in the LA360 as feedback recipients, and were rated by over 9500 feedback providers, including direct managers, direct reports, and other stakeholders. The statistics reported in this section are based on these respondents.

Gender

Male	Female
65%	35%

Age

<40	40-49	50-59	60+
27%	44%	26%	3%

Race

Caucasian/White	African/Black	Hispanic/Latin	Asian	Other
82%	2%	4%	3%	8%

Management Level

First Level/Team Leader	Mid-Level	Sr. Manager/ Staff Function	Sr. Manager/ Line of Business	Top Executive BU/Staff Head
11%	15%	25%	22%	27%

Number of Direct Reports

None	1-2	3-5	6-10	11+
9%	10%	29%	34%	19%

Number of People in Own Organization

0-9	10-99	100-999	1000-5000	>5000
21%	44%	28%	6%	1%

Business Context

Stable Business	Start-up	Rapid Growth	Turnaround	Merger/ Reorganization
40%	3%	32%	11%	14%

NORMS FOR AGILITY SCORES – OVERALL

Norms for Leadership Agility 360 scores are displayed in this section grouped by Leadership Agility category (Overall / by Acton Arena / by Type of Agility)

Overall Leadership Agility

Overall	6%	18%	40%	30%	6%
Cumulative Pct.	6%	24%	64%	94%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

By Action Arena

Leading Organizational Change

Overall Score	6%	18%	39%	31%	6%
Cumulative Pct.	6%	25%	63%	94%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Improving Team Performance

Overall Score	8%	20%	36%	29%	8%
Cumulative Pct.	8%	28%	63%	92%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Engaging in Pivotal Conversations

Overall Score	7%	20%	35%	29%	9%
Cumulative Pct.	7%	27%	62%	91%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

By Type of Agility

Context-setting Agility

Overall Score	6%	20%	41%	28%	5%
Cumulative Pct.	6%	26%	67%	95%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Stakeholder Agility

Overall Score	4%	13%	31%	39%	14%
Cumulative Pct.	4%	16%	47%	86%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Creative Agility

Overall Score	4%	16%	36%	33%	10%
Cumulative Pct.	4%	20%	56%	90%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Self-leadership Agility

Overall Score	19%	32%	29%	16%	5%
Cumulative Pct.	19%	51%	79%	95%	100%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

NORMS FOR AGILITY SCORES – BY RESPONDENT GROUP

Norms for Leadership Agility 360 scores are displayed in this section grouped by Leadership Agility category (Overall / by Action Arena / by Type of Agility) according to the respondent group (Manager(s), Direct Reports, and other Stakeholders)

Overall Leadership Agility

Manager	13%	12%	29%	36%	9%
Direct Report	2%	19%	44%	30%	6%
Stakeholder	3%	23%	46%	23%	5%
Overall	6%	18%	40%	30%	6%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

By Action Arena

Leading Organizational Change

Manager	12%	15%	27%	37%	9%
Direct Report	3%	17%	44%	31%	6%
Stakeholder	3%	23%	45%	25%	4%
Overall	6%	18%	39%	31%	6%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Improving Team Performance

Manager	14%	16%	27%	32%	11%
Direct Report	3%	22%	40%	28%	6%
Stakeholder	6%	22%	39%	25%	8%
Overall	8%	20%	36%	29%	8%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Engaging in Pivotal Conversations

Manager	15%	15%	26%	32%	12%
Direct Report	2%	20%	39%	31%	8%
Stakeholder	4%	24%	39%	25%	8%
Overall	7%	20%	35%	29%	9%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

By Type of Agility

Context-setting Agility

Manager	12%	18%	30%	31%	9%
Direct Report	2%	18%	45%	31%	4%
Stakeholder	5%	23%	47%	23%	3%
Overall	6%	20%	41%	28%	5%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Stakeholder Agility

Manager	8%	14%	24%	38%	17%
Direct Report	1%	11%	31%	42%	15%
Stakeholder	2%	14%	39%	36%	10%
Overall	4%	13%	31%	39%	14%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Creative Agility

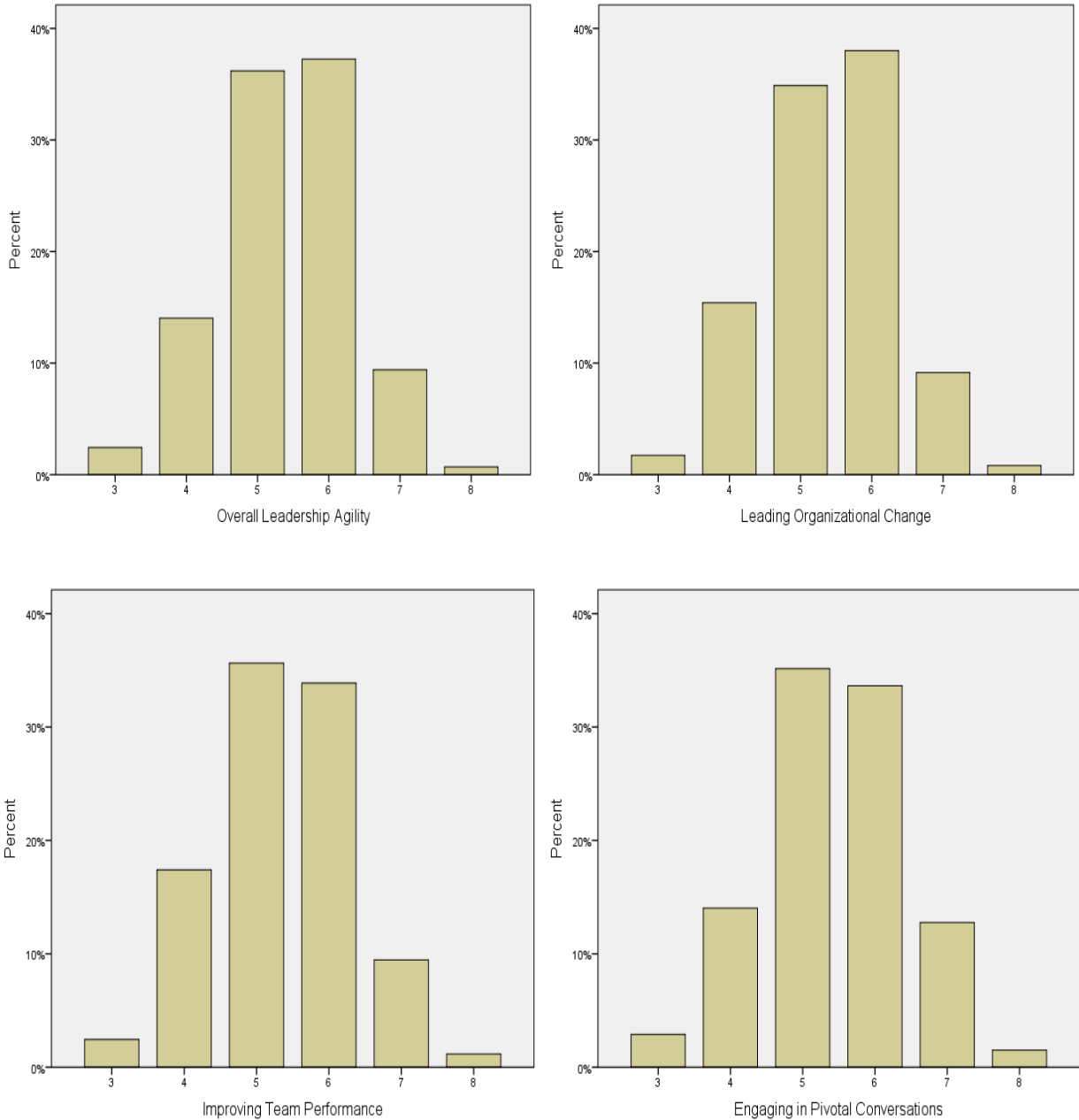
Manager	10%	14%	26%	37%	13%
Direct Report	1%	15%	40%	35%	9%
Stakeholder	3%	18%	43%	28%	9%
Overall	4%	16%	36%	33%	10%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Self-leadership Agility

Manager	25%	21%	24%	21%	9%
Direct Report	14%	39%	31%	14%	3%
Stakeholder	17%	37%	31%	12%	3%
Overall	19%	32%	29%	16%	5%
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

DISTRIBUTION OF LEADERSHIP AGILITY SCORES

The frequency distributions of Leadership Agility 360 scores (for overall Leadership Agility and for each of the three Leadership Agility arenas) are displayed below. Distributions are calculated by rounding the scores to the nearest integer.



Average scores for the 24 leadership practices range from 2.4 to 8.6, with Standard Deviations ranging from 0.89 to 1.19. Note also the absence of leniency effects and skew that are typical of other 360-degree assessments.

Reliability and Validity

SCALE PROPERTIES

Scale reliabilities calculated for the three Action Arenas:

	Leading Change	Improving Teams	Pivotal Conversations
Cronbach's α	.88	.87	.86

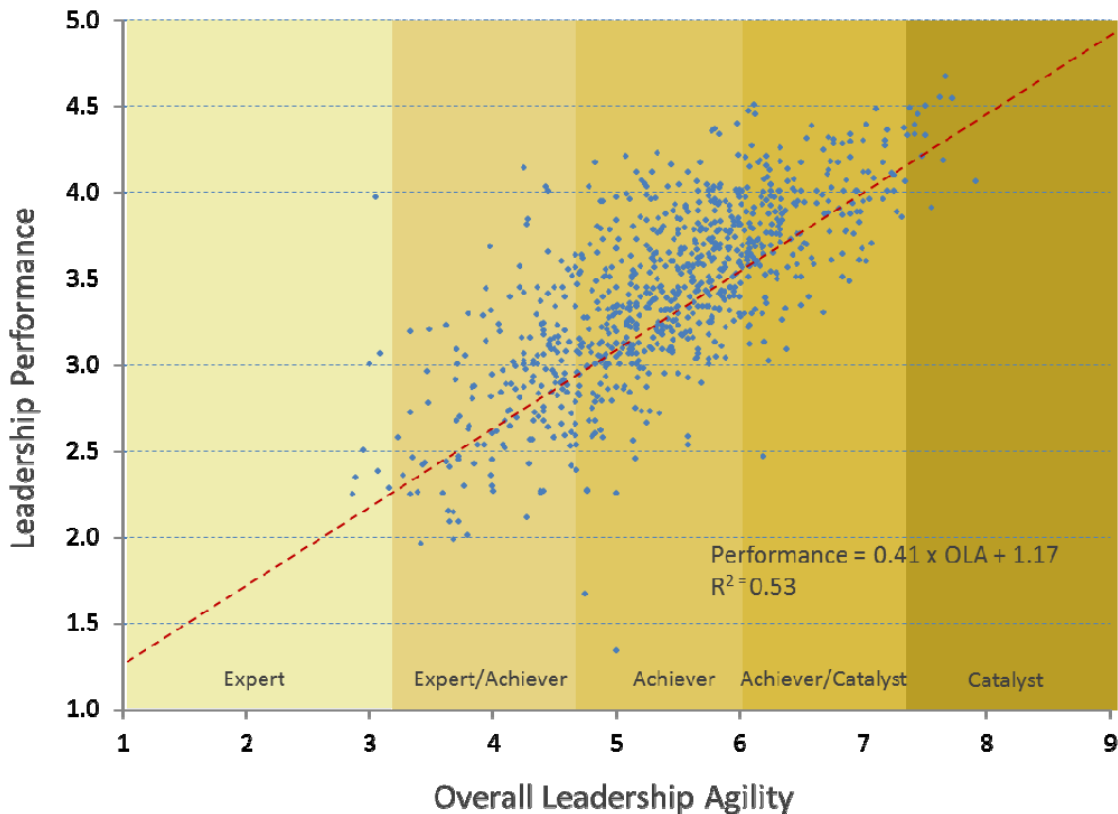
Scale reliabilities calculated for the four Types of Agility across Action Arenas:

	Context-setting Agility	Stakeholder Agility	Creative Agility	Self-leadership Agility
Cronbach's α	.79	.85	.82	.88

Average inter-scale correlations for the four Types of Agility = 0.66 (high, but less than intra-scale reliability).

CONCURRENT VALIDITY

The overall Leadership Agility scores of feedback recipients are plotted below against an independent assessment of their leadership performance provided by feedback providers. The correlation between Overall Leadership Agility score and perceived leadership effectiveness is a highly significant 0.73 ($p < .000$).



Differences by Gender, Age and Race/Ethnic Origin

Multivariate analyses of variance were conducted for gender, age and race/ethnic origin to investigate potential sources of bias in the instrument.

Gender:

Overall Leadership Agility

Male	Female
5.33	5.59

- $F(1,808) = 17.16, p < 0.001$.

Leading Organizational Change

Male	Female
5.36	5.58

- $F(1,808) = 12.26, p < 0.001$.

Improving Team Performance

Male	Female
5.25	5.58

- $F(1,808) = 25.39, p < 0.001$.

Engaging in Pivotal Conversations

Male	Female
5.38	5.65

- $F(1,808) = 15.83, p < 0.001$.

Age:

Overall Leadership Agility

<40	40-49	50-59	60+
4.90	5.00	5.31	5.08

- $F(4,816) = 0.94, p < 0.40$.

Leading Organizational Change

<40	40-49	50-59	60+
4.84	5.00	5.34	5.05

- $F(4,816) = 1.95, p < 0.10$.

Improving Team Performance

<40	40-49	50-59	60+
5.01	4.88	5.23	4.98

- $F(4,816) = 1.61, p < 0.20$.

Engaging in Pivotal Conversations

<40	40-49	50-59	60+
4.99	5.12	5.47	5.00

- $F(4,816) = 0.93, p < 0.40$.

Race/Ethnic Group:

Overall Leadership Agility

Caucasian	Other
5.44	5.41

- $F(1,807) = 0.12, p = \text{ns}$.

Leading Organizational Change

Caucasian	Other
5.45	5.46

- $F(1,807) = 0.02, p = \text{ns}$.

Improving Team Performance

Caucasian	Other
5.38	5.42

- $F(1,807) = 0.24, p = \text{ns}$.

Engaging in Pivotal Conversations

Caucasian	Other
5.50	5.43

- $F(1,807) = 0.63, p = \text{ns}$.

Differences by Job Conditions and Leadership Challenges

Multivariate analyses of variance were conducted for the responses to the following questions asked of the respondent at the end of their self-assessment. The results are listed in the order of statistical significance.

SIGNIFICANT RESULTS

1. How many people are there in the organizational unit for which you are responsible?

	0-9	10-99	100-999	1000+	
Leading Change	5.28	5.42	5.54	5.58	F(1,849)=10.72, p<.001
Improving Teams	5.21	5.34	5.52	5.49	F(1,849)=10.54, p<.001
Pivotal Conversations	5.34	5.46	5.55	5.67	F(1,849)=7.04, p<.005
Overall Agility	5.27	5.38	5.55	5.57	F(1,849)=11.59, p<.001
% Responding	21%	44%	28%	7%	100%

2. How stable/dynamic is the organizational environment in which you work?

	1 = Fairly stable	2	3	4	5 = Continuous change	
Leading Change	5.20	5.45	5.48	5.38	5.60	F(1,848)=16.60, p<.001
Improving Teams	5.21	5.35	5.41	5.38	5.60	F(1,848)=6.46, p<.01
Pivotal Conversations	5.27	5.49	5.44	5.60	5.77	F(1,848)=13.15, p<.001
Overall Agility	5.21	5.43	5.48	5.51	5.67	F(1,848)=12.48, p<.10
% Responding	17%	21%	35%	17%	11%	100%

MARGINALLY SIGNIFICANT RESULTS

3. How many direct reports do you have?

	None	1-2	3-5	6-10	11+	
Leading Change	5.39	5.36	5.36	5.50	5.50	F(4,848)=1.24, p<.30
Improving Teams	5.43	5.24	5.25	5.41	5.53	F(4,848)=2.78, p<.05
Pivotal Conversations	5.61	5.47	5.36	5.48	5.60	F(4,848)=1.84, p<.15
Overall Agility	5.46	5.34	5.31	5.45	5.55	F(4,848)=1.98, p<.10
% Responding	9%	10%	29%	34%	19%	100%

4. To what extent does your success depend on your ability to work with internal or external stakeholders?

1 = Not significant	1	2	3	4	5	5 = Exceptionally significant
Leading Change		5.29	5.41	5.44	5.49	F(1,848)=2.02, p<.20
Improving Teams		5.23	5.34	5.38	5.41	F(1,848)=0.33, p=ns
Pivotal Conversations		5.21	5.48	5.50	5.48	F(1,848)=1.22, p<.30
Overall Agility		5.20	5.40	5.44	5.46	F(1,848)=1.32, p<.30
% Responding	0%	3%	12%	47%	38%	100%

NON-SIGNIFICANT RESULTS

5. Compared to other managers in similar roles, how challenging are the leadership issues that you currently face?

1 = Not very challenging	1	2	3	4	5	5 = Exceptionally challenging
Leading Change	5.30	5.49	5.43	5.44	5.36	F(1,848)=0.22, p=ns
Improving Teams	5.44	5.36	5.37	5.39	5.28	F(1,848)=0.28, p=ns
Pivotal Conversations	5.20	5.52	5.48	5.49	5.48	F(1,848)=0.60, p=ns
Overall Agility	5.38	5.46	5.42	5.43	5.34	F(1,848)=0.05, p=ns
% Responding	2%	11%	41%	40%	6%	100%