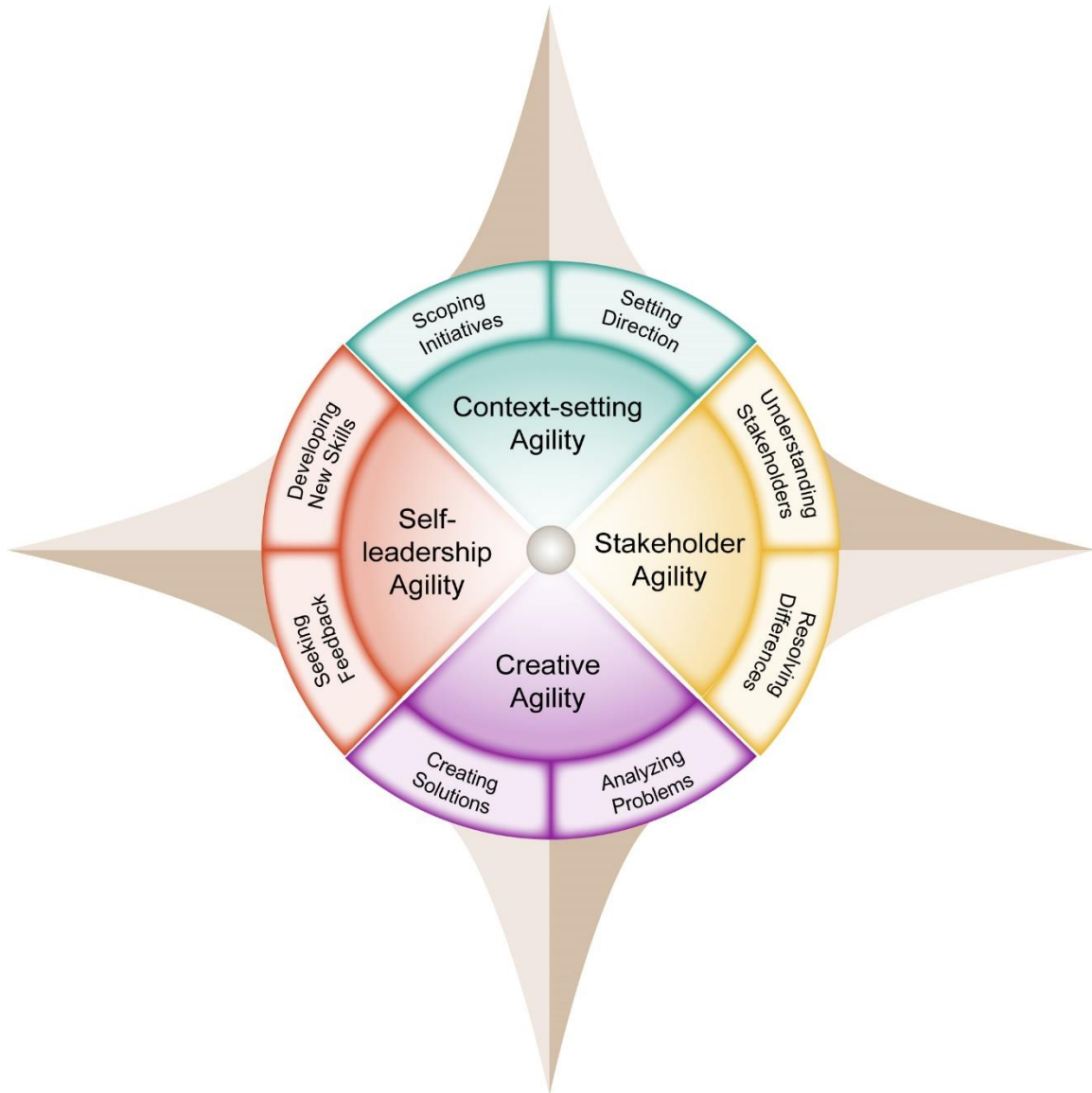


Leadership Agility™ 360 Technical Manual



A guide to the development of the Leadership Agility™ 360, the research behind the instrument, participant norms, and statistical properties



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Introduction

Consistently effective leadership in today's world requires **agility** – the ability to take wise and effective action amid complex, rapidly changing conditions. But it turns out that agility is not a single competency. It is a personal capacity that can be channeled into everything a leader does.

Leadership agility much more than “learning agility”, which is the ability to learn from experience and then apply that learning to perform successfully in new assignments. Leadership agility, as we define it, refers to the full set of mindsets and skills that distinguishes those leaders who are most effective in today's complex, rapidly changing environment.

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

The purpose of this document is to:

- Introduce the basic concepts in the framework underlying the Leadership Agility 360.
- 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?

Consistently effective leadership in today's world requires **agility** – the ability to take wise and effective action amid complex, rapidly changing conditions. But it turns out that agility is not a single competency. It is a personal capacity that can be channeled into everything a leader does. Leadership agility, as we define it, refers to the full set of mindsets and skill-sets that distinguishes those leaders who are most effective in today's complex, rapidly changing environment.

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.

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:** Managers who lead incremental improvements by using their authority and expertise, supervise direct reports, and are passionate but often opinionated problem-solvers.
- **Achiever:** Managers who lead by motivating others and gaining buy-in to achieve strategic change objectives, orchestrate team performance, work across boundaries, and step up to challenging conversations.
- **Catalyst:** These rare managers can successfully lead transformative change, develop agile organizations and highly engaged teams, and collaborate with others to develop creative, high-leverage solutions to thorny organizational issues.

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.

FEEDBACK IN CONTEXT

Traditional 360 feedback instruments use rather abstract competency descriptions with little or no reference to the contexts within which they are used. Our research shows that a manager's leadership behaviors vary according to whether the context is leading change, improving team performance, or engaging in pivotal, one-on-one conversations. In the Leadership Agility model and in the 360, these three leadership contexts are called "action arenas."

The Leadership Agility 360 assesses level of leadership agility within each arena. There are 24 multiple choice questions in all, eight devoted to each action arena ...

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

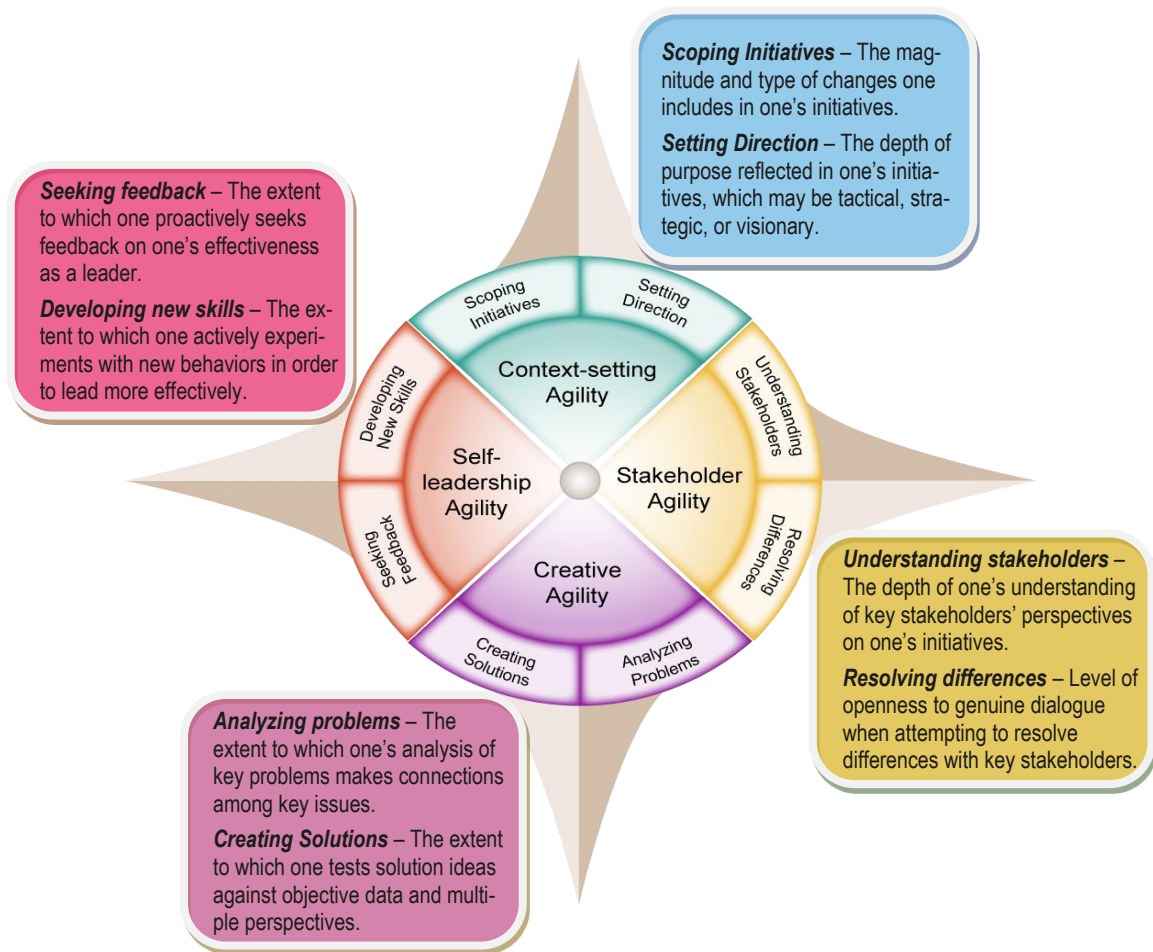
FOUR TYPES OF LEADERSHIP AGILITY

Leadership Agility is a multidimensional capability that includes four mutually reinforcing types of agility, which can be exercised within each of the action arenas identified above:

- **Context-setting agility:** the ability to scan the environment, frame leadership initiatives that need to be taken, and clarify the outcomes that need to be achieved.
- **Stakeholder agility:** the ability to engage with key stakeholders in ways that build support for leadership initiatives.
- **Creative agility:** the ability to transform problems encountered into the results that are needed.
- **Self-leadership agility:** the ability to use leadership initiatives as opportunities to develop into the kind of leader one aspires 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.



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 aforementioned action arenas (8 items per arena).

The instrument includes a self-assessment and assessments by others, including primary manager, secondary manager (optional), direct reports, key stakeholders, and other stakeholders (optional). 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:

- Read all three "behavioral descriptions" for the item, and decide on the **one behavior** that best characterizes how the person typically acts.
- Rate how **effectively** the person demonstrates the selected behavior on a scale of 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 is the absence of halo effects and scenes in responses by feedback providers.

In addition, 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. Using this process, the feedback provider answers the first question for each person in a group, then does the same for the second question, and so on. For example, managers who need 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.

COMPUTATION OF SCORES

As noted above, each leadership arena is represented by eight practices. One option for computing overall scores for each action arena would be to average of the ratings of individual items within each arena. However, due to this instrument's unique two-step process for rating each item, averaging these items would systematically overstate an individual's level of agility. To correct for this, overall scores for each action arena are calculated as the **median** of the eight ratings given by each feedback provider. Scores for groups of respondents (e.g., direct reports or key stakeholders) are calculated as the **average of the median** scores given by individuals in each respondent provider group.

For single respondents (self, direct manager, and secondary manager), overall Leadership Agility scores are reached by calculating the median of the scores for all 24 leadership practices. For groups with multiple respondents (direct reports and stakeholders), overall scores are reached by calculating the average of the median scores.

In addition to overall scores by action arena, the feedback report provides an overall Leadership Agility score. (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. Our early experience with the instrument revealed 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 direct reports but as an Achiever by peers and key stakeholders.

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.

FEEDBACK REPORTS AND SUPPORT MATERIALS

A feedback report of innovative design begins with an assessment of level of leadership agility overall and for each of the three action arenas. Next comes written feedback (strengths and needs for improvement) for each arena, followed by quantitative feedback on each of the 24 leadership practices, again 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 an Action Plan for leadership agility practices they have decided to undertake. A companion Coach Workbook is provided to aid the feedback recipient’s certified coach prepare to help them debrief their feedback.

Basic Statistics and Norms

RESPONDENT DEMOGRAPHICS

As of October 2018, 2,845 leaders participated in the Leadership Agility 360 as feedback recipients. They were assessed by over 32,500 feedback providers.

Although the majority of feedback recipients and stakeholders are from the US, other countries and regions represented include Canada, the UK, Ireland, the Netherlands, Sweden, France, Germany, Greece, Africa, India, China, Japan, Thailand, Australia, and Latin America.

Gender

Male	Female
65%	35%

Age

<40	40-49	50-59	60+
26%	45%	25%	4%

Race

Caucasian/White	African/Black	Hispanic/Latin	Asian	Other
74%	4%	7%	4%	11%

Time in Current Position

Less than 1 Year	1-2 Years	3-5 Years	6-10 Years	>10 Years
18%	31%	30%	13%	9%

Management Level

First Level/Team Leader	Mid-Level	Sr. Manager/ Staff Function	Sr. Manager/ Line of Business	Top Executive BU/Staff Head
9%	12%	24%	24%	31%

Number of Direct Reports

None	1-2	3-5	6-10	>11
8%	9%	32%	33%	18%

Number of People in Own Organizational Unit

1-9	10-99	100-999	1000-5000	>5000
22%	46%	26%	6%	1%

Business Context

Stable Business	Start-up	Rapid Growth	Turnaround	Merger/ Reorganization
41%	4%	30%	11%	14%

NORMS FOR AGILITY SCORES – OVERALL

Norms are based on the average of the median scores across all feedback provider categories, not including participants' self-assessments.

Overall Leadership Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall	2%	16%	50%	28%	4%
Cumulative Pct.	2%	18%	68%	96%	100%

By Action Arena

Leading Organizational Change

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall Score	2%	17%	52%	26%	3%
Cumulative Pct.	2%	19%	71%	97%	100%

Improving Team Performance

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall Score	2%	20%	48%	26%	4%
Cumulative Pct.	2%	22%	70%	96%	100%

Engaging in Pivotal Conversations

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall Score	2%	18%	45%	29%	6%
Cumulative Pct.	2%	20%	65%	94%	100%

By Type of Agility

Context-setting Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall Score	2%	19%	51%	25%	3%
Cumulative Pct.	2%	21%	72%	97%	100%

Stakeholder Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall Score	1%	11%	38%	43%	9%
Cumulative Pct.	1%	10%	48%	91%	100%

Creative Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall Score	1%	12%	47%	35%	5%
Cumulative Pct.	1%	13%	60%	95%	100%

Self-leadership Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Overall Score	9%	34%	42%	13%	2%
Cumulative Pct.	9%	43%	85%	98%	100%

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 Acton Arena / by Type of Agility) according to the respondent group (Manager(s), Direct Reports, and Stakeholders).

Overall Leadership Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	13%	12%	45%	12%	9%
Direct Reports	3%	17%	48%	25%	7%
Key Stakeholders	5%	20%	49%	21%	5%

By Action Arena

Leading Organizational Change

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	13%	13%	51%	14%	9%
Direct Reports	4%	15%	48%	25%	7%
Key Stakeholders	5%	20%	49%	21%	5%

Improving Team Performance

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	15%	13%	46%	14%	12%
Direct Reports	5%	19%	43%	25%	8%
Key Stakeholders	6%	21%	46%	22%	5%

Engaging in Pivotal Conversations

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	15%	15%	43%	14%	13%
Direct Reports	4%	16%	43%	27%	10%
Key Stakeholders	5%	20%	42%	25%	8%

By Type of Agility

Context-setting Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	15%	15%	48%	13%	9%
Direct Reports	4%	17%	48%	25%	6%
Key Stakeholders	5%	21%	48%	22%	4%

Stakeholder Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	10%	10%	42%	20%	18%
Direct Reports	2%	10%	34%	37%	17%
Key Stakeholders	3%	13%	38%	34%	12%

Creative Agility

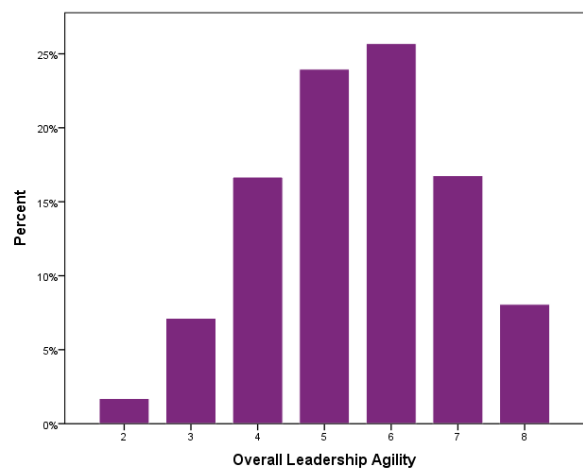
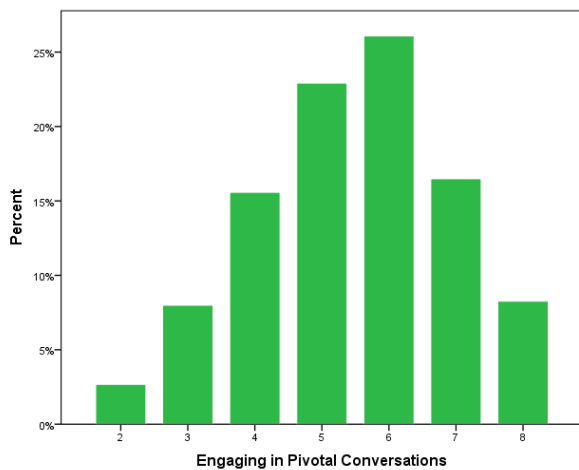
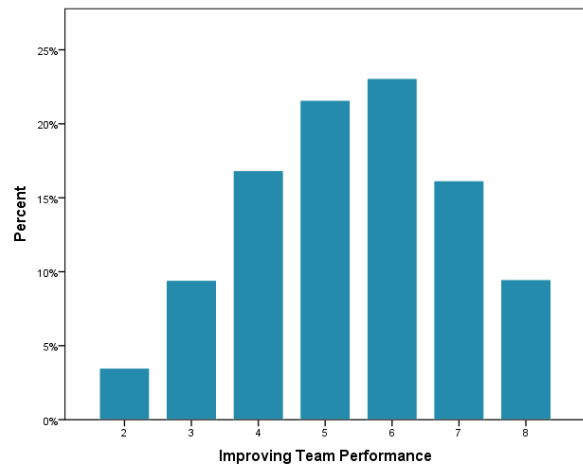
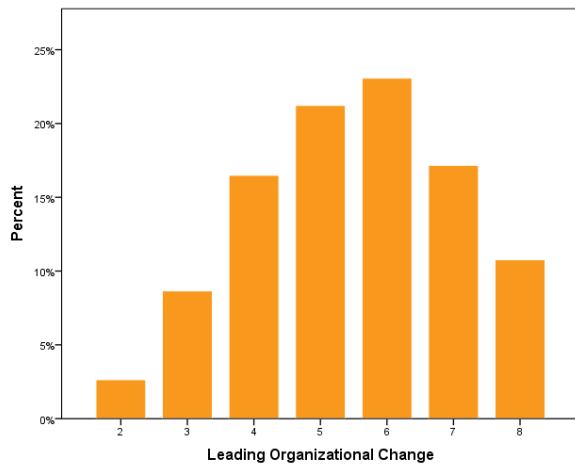
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	11%	13%	46%	17%	13%
Direct Reports	2%	13%	42%	31%	11%
Key Stakeholders	3%	17%	44%	28%	8%

Self-leadership Agility

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Managers	25%	18%	36%	11%	10%
Direct Reports	14%	33%	38%	13%	4%
Key Stakeholders	16%	32%	37%	12%	3%

DISTRIBUTION OF LEADERSHIP AGILITY SCORES

The frequency distributions of scores for overall Leadership Agility and for each of the three arenas are displayed below. (Scores are rounded to the nearest integer).



Average scores for the 24 leadership practices range from 1.6 to 9.0, with Standard Deviations ranging from 0.96 to 1.25. 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	.86	.88	.88

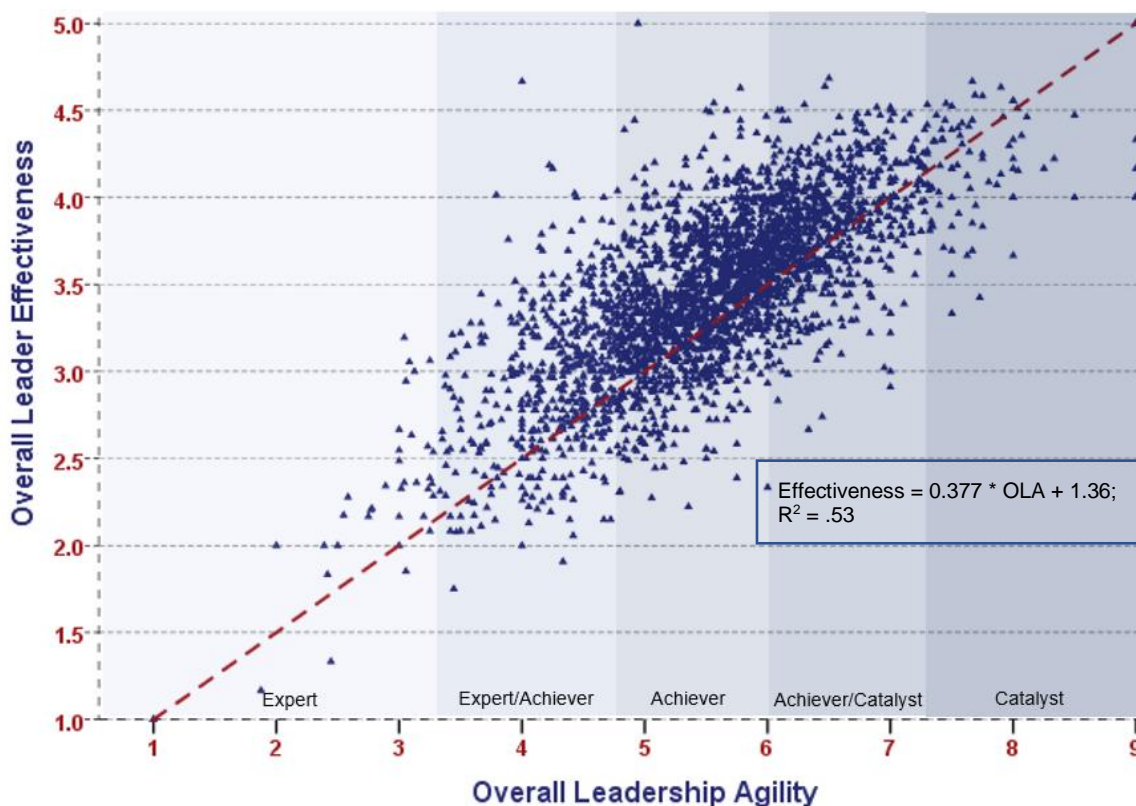
Scale reliabilities calculated for the four Types of Agility across Action Arenas:

	Context-setting Agility	Stakeholder Agility	Creative Agility	Self-leadership Agility
Cronbach's α	.80	.85	.83	.88

The average inter-scale correlations among the three action arenas and the four types of agility ($r=.69$ and $r=.66$, respectively) are 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 ratings of leadership performance is a highly significant 0.72 ($p<.000$).



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
5.46	5.75

- $F(1,2693) = 61.05, p < .001$

Leading Organizational Change

Male	Female
5.46	5.74

- $F(1,2693) = 57.79, p < .001$

Improving Team Performance

Male	Female
5.42	5.71

- $F(1,2693) = 54.19, p < .001$

Engaging in Pivotal Conversations

Male	Female
5.51	5.80

- $F(1,2693) = 50.05, p < .001$

Age**

Overall Leadership Agility

<40	40-49	50-59	60+
5.59	5.58	5.48	5.81

- $F(4,816) = 0.94, p < .40$

Leading Organizational Change

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

- $F(3,2692) = 3.62, p < .15$

Improving Team Performance

<40	40-49	50-59	60+
5.56	5.55	5.39	5.75

- $F(3, 2693) = 6.43, p < .001$

Engaging in Pivotal Conversations

<40	40-49	50-59	60+
5.64	5.63	5.53	5.84

- $F(3,2693) = 3.51, p < .015$

Race/Ethnic Group***

Overall Leadership Agility

Caucasian	Other
5.56	5.58

- $F(1,2488) = 0.383, p = ns$

Leading Organizational Change

Caucasian	Other
5.55	5.56

- $F(1,2488) = 0.02, p = ns$

Improving Team Performance

Caucasian	Other
5.51	5.55

- $F(1,2488) = 0.78, p = ns$

Engaging in Pivotal Conversations

Caucasian	Other
5.61	5.63

- $F(1,2488) = 0.76, p = ns$

* Controlling for organizational level

** Controlling for gender

*** Controlling for gender, age and organizational level

Differences by Role, Context, and Leadership Challenge

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 most significant results ($P < .01$ or greater) are highlighted in red in the right-hand column.

1. What is your current management role?

	First-level	Mid-level	Senior Staff	Senior Line	Top Exec	
Leading Change	5.37	5.55	5.57	5.57	5.59	F(4,2836)=3.50, p<.01
Improving Teams	5.41	5.53	5.52	5.58	5.50	F(4,2836)=1.80, p<.15
Pivotal Conversations	5.66	5.62	5.65	5.59	5.57	F(4,2836)=0.84, p=ns
Overall Agility	5.47	5.57	5.57	5.59	5.55	F(4,2836)=13.72, p<.001
% Responding	12%	14%	25%	23%	26%	100%

2. How many direct reports do you have?

	None	1-2	3-5	6-10	11+	
Leading Change	5.53	5.53	5.49	5.63	5.53	F(4,2846)=2.61, p<.05
Improving Teams	5.52	5.46	5.43	5.59	5.56	F(4,2846)=3.12, p<.02
Pivotal Conversations	5.83	5.65	5.56	5.60	5.59	F(4,2846)=3.64, p<.01
Overall Agility	5.53	5.53	5.49	5.63	5.53	F(4,2846)=1.76, p<.10
% Responding	9%	9%	32%	33%	17%	100%

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

	0-9	10-99	100-999	1000-5000	5000+	
Leading Change	5.46	5.49	5.62	5.94	5.78	F(4,2836)=13.54, p<.001
Improving Teams	5.44	5.45	5.60	5.87	5.78	F(4,2836)=11.00, p<.001
Pivotal Conversations	5.63	5.54	5.62	5.98	5.74	F(4,2836)=8.30, p<.001
Overall Agility	5.52	5.48	5.63	5.97	5.77	F(4,2836)=13.72, p<.001
% Responding	22%	47%	23%	7%	2%	100%

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

1 = Fairly stable	1	2	3	4	5	5 = Continuous change
Leading Change	5.39	5.48	5.52	5.71	5.70	F(4,2836)=10.31, p<.001
Improving Teams	5.39	5.45	5.48	5.67	5.64	F(4,2836)=6.98, p<.001
Pivotal Conversations	5.48	5.57	5.56	5.75	5.75	F(4,2836)=6.92, p<.001
Overall Agility	5.41	5.51	5.52	5.71	5.70	F(4,2836)=8.50, p<.001
% Responding	15%	19%	35%	15%	15%	100%

5. 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	ns	5.47	5.38	5.54	5.63	F(4,2836)=7.86, p<.001
Improving Teams	ns	5.55	5.37	5.52	5.57	F(4,2836)=5.83, p<.001
Pivotal Conversations	ns	5.62	5.49	5.61	5.65	F(4,2836)=2.90, p<.025
Overall Agility		5.47	5.38	5.54	5.63	F(4,2836)=7.06, p<.001
% Responding	0%	2%	13%	48%	37%	100%

6. 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	5.39	5.53	5.54	5.57	5.57	F(4,2836)=7.86, p<.001
Improving Teams	5.51	5.50	5.51	5.52	5.54	F(4,2836)=5.83, p<.001
Pivotal Conversations	5.60	5.66	5.60	5.61	5.59	F(4,2836)=2.90, p<.025
Overall Agility	5.52	5.57	5.55	5.56	5.58	F(4,2836)=7.06, p<.001
% Responding	2%	12%	43%	37%	6%	100%