360 Feedback Project Requirements Checklist

Name: .... Email ....

Organisation:.. ....

We have created this checklist to help you minimise any possibility of delays, errors and miscommunications before starting your 360 degree feedback project.

You can use this document with your own projects or to enable us to help set up your project for you.

Purpose

The purpose of this checklist is to enable you to fully document your 360 project's requirements, e.g. resources and timings. Ideally, the document is completed before the project begins, though timings and specifications can always be adjusted once it is under way.

How will the project move the organisation forward?	
Project purpose, e.g. 1. to measure performance before an annual appraisal 2. to measure competency before an employee development programme	
Name of the 360 Project. This name will be used on screens and in printed reports.	

Timings

Milestones		*Deadline / Timeframe*	*Completed?*	*Notes*
1	360 Feedback Project Requirements Checklist signed off by Stakeholder/HR Manager			
2	General questions agreed with Stakeholder/HR Manager			
3	Competencies and Competency Statements agreed with Stakeholder/HR Manager			
4	Report contents, sections and terminology agreed with Stakeholder/HR Manager			
5	Email Notifications agreed with Stakeholder/HR Manager (if they want them tailored)			
6	Set up project environment within 360FeedbackManager			
7	Upload of employee details (complete employee database or only those participating)			
8	Participating employees assigned as Subjects within system.			
9	Deadline by which Subjects will have agreed their Raters (or by which the Admin will have appointed them)			
10	Raters' feedback-gathering start and end date			
11	Date by which all Reports need to be authorised.			
12	Subjects' coaching timeframe, e.g. *within 2 weeks of completion of data collection phase*.			

Preparation

Roles:

	Yes/No	*Roles*	*Responsibilities*	Name / *Email / Notes*
Are you running the project yourself completely?		***Administrator***	*Has full access to all functions. Sets up and manages the system and reports to both HR director and 360 consultant.*	
If **no**, identify the 360 Consultant and/or Stakeholder		***360 Consultant***	*Oversees progress and authorises reports. Also has access to the raw data.*	
		Stakeholder	*Has access to progress reports*	

Rater Types:

	Minimum number required	*Notes*
Manager		
Peer		
Subordinate		
Supplier		
Customer		
Additional types?		

Things to think about to ensure success

	Yes/No	Comments
Have the Raters undergone any training in giving effective feedback? *If not, 360 Feedback Manager optionally provides training videos on how to overcome blocks to giving feedback.*		
If Raters fail to respond, what contingency plan do you have in place? E.g. dates for follow-up notifications		
What is your target Rater response rate (%)?		
Decide on whether the organisation or the Subjects themselves will be adding Raters to the study.		
Are you allowing subjects to add external Raters (e.g. customers or suppliers), and therefore require a different tone of notification?		
Would it be best to run more than one Project? Reasons to do this might include: ▪ Subjects need to be measured on their own specific competencies e.g. one size might not fit all ▪ You might have a group that are not available during the preferred feedback gathering month ▪ To run a small pilot in order to test the quality of the responses ▪ Different levels of seniority requiring different competency sets		
Policy on following up on respondents, e.g. by email, personal contact or phone call?		
Does the project need to be branded under your Stakeholder's organisation name?		