



Leadership Excellence Core 4 Insights Tool

Participant Checklist

Congratulations on choosing to engage in the Children's Mercy Leadership Excellence Core 4 Insights 360 process. The *Leadership Excellence Core 4 Insights Tool* is based on the Children's Mercy Leadership Excellence Core 4 Model. You can find more information about the model [on the Leadership Excellence Core 4 Insights Tool FAQs page](#).

This **Participant Checklist** and the **Rater Worksheet** attached have been designed to walk you through the process, including what you need to do to prepare for this process. Please complete the steps below in the order presented.

- Select Raters**

You'll choose one (1) Supervisor, a minimum of 3 invitees for the Direct Reports group, a minimum of 5 invitees for each of the Peer and Other groups, and up to 12 Peers, up to 25 Direct Reports and up to 12 individuals to be included in an "Others" group to respond to the questionnaire. While not required, we recommend discussing your list of raters with either your supervisor or the OD team. We recommend you choose raters who will have adequate time to complete the assessment, and who will respond honestly to the items. While it can be tempting to select raters who will offer positive feedback, you will gain the most useful insights from a balanced mix of respondents. [Learn more about selecting raters here](#).
- Send Initial Email to Raters**

Even if you've spoken with your raters personally, it is important for you to send an initial email out to notify or remind them of your participation in this process. This alerts them to expect the automated emails they will receive from Pixel Assessments (assessments@pixelleadershipgroup.com, they know that you are an active and willing participant in the process, and they are prepared to start and complete the assessment within the 3-week window. [Basic templates are available for your use on the FAQ page](#).
- Complete the Registration Portal**

Children's Mercy Organization Development department will provide you with the web address to the *Leadership Excellence Core 4 Insights 360 Registration Portal*. To prepare to complete the Registration Portal, use the attached **Rater Worksheet** to gather the names and email addresses of the raters you would like to invite into the process. When entering your data into the registration portal *it is crucial that you enter all email addresses correctly*. Pixel Leadership Group sends email invitations and reminders on **Wednesday of each week**. Your assessment will launch with the initial invite sent to you and your raters *the Wednesday following when you completed and submitted your registration through the Registration Portal* (for example, if you register on Tuesday, August 13 it will launch on Wednesday, August 14). **The assessment is open for 3 weeks from the launch date.**

Complete Your Self-Assessment

You and your raters will receive an email invitation from *Pixel Assessments* on the Wednesday following when you completed your registration, which will include a link to the questionnaire. **You must complete the questionnaire in one sitting.** If you close the questionnaire (i.e., the internet browser window), your data will be lost and you will be asked to start over next time you enter the assessment. Do your best to answer the items based on how you actually behave at work as opposed to how you intend, or would like to behave. The open-ended questions at the end are particularly useful for personal reflection. This assessment usually takes about 15-20 minutes.

Schedule Debrief with Coach

Review your schedule for availability about 5 weeks after your assessment launch date. Contact the coach assigned to conduct your debrief to schedule the appointment. You will be asked to participate in 2 debrief sessions: the first one is 90 minutes and the second will occur approximately a week later and will be 60 minutes. During your debrief session, your coach will review your report with you and assist you in formulating a set of leadership development goals.

Be Prepared to Send Reminders

While the automated system will send out reminders to your raters once per week, personal reminder emails are most effective. [Basic templates are provided on the FAQ page.](#) You can also use the *Rater Worksheet* to track the *personal reminders*, which we recommend that you send out to your raters at the *two-week mark*.

Send Thank You Note

Once you receive your report, send a note thanking your raters for their time and effort in support of your leadership development. [A basic template is provided on the FAQ page.](#)

Schedule Review Session with Your Manager

Schedule time to review your development goals with your manager, preferably within 2 weeks of receiving your report.

If you have questions or need assistance, please contact:

Erik Crew
Leadership Development Consultant
ODsupport@cmh.edu
Phone: (816) 302-0053 ext. 70053.

Rater Worksheet

This worksheet will help you organize your raters' contact information before entering it into the Registration Portal. Please check all email addresses for accuracy to ensure automated reminder emails reach your selected raters.

Supervisor Information

Please provide us information about your supervisor.

Please note: Your "Supervisor" is the individual to whom you report on the organizational chart. Typically, this is the individual who guides your work and evaluates your performance. You can designate **only one** individual as your Supervisor; this individual's feedback will NOT be anonymous.

SUPERVISOR

First Name:

Last Name:

Email:

Peer Information

Here, you will provide us information about your peers.

Please note: A "Peer" is typically an individual who falls at a similar level as you on the organizational chart. Usually there is not a formal reporting relationship between peers. You are **required to invite at least 5 peers**, but we encourage you to invite all your peers up to 25 individuals. The insights you receive from these individuals WILL be anonymous.

PEER 1

First Name:

Last Name:

Email:

□

PEER 2

First Name:

Last Name:

Email:

□

PEER 3

First Name:

Last Name:

Email:

□

□

□

PEER 4

First Name:

□

Last Name:

Email:

PEER 5

First Name:

□

Last Name:

Email:

PEER 6

First Name:

□

Last Name:

Email:

PEER 7

First Name:

□

Last Name:

Email:

PEER 8

First Name:

□

Last Name:

Email:

PEER 9

First Name:

□

Last Name:

Email:

PEER 10

First Name:

□

Last Name:

Email:

PEER 11

First Name:

□

Last Name:

Email:

PEER 12

First Name:

□

Last Name:

Email:

Direct Report Information

Here, you will provide us information about your direct reports.

Please note: A "Direct Report" is typically an individual with whom you have a formal reporting relationship and you are responsible for evaluating their performance, or you informally supervise and direct their work. You are **required to invite at least 3 direct reports**, but we encourage you to invite all your direct reports, up to 25 individuals. The insights you receive from these individuals WILL be anonymous.

DIRECT REPORT 1

First Name:

Last Name:

Email:

DIRECT REPORT 2

First Name:

Last Name:

Email:

DIRECT REPORT 3

First Name:

Last Name:

Email:

DIRECT REPORT 4

First Name:

Last Name:

Email:

DIRECT REPORT 5

First Name:

Last Name:

Email:

DIRECT REPORT 6

First Name:

Last Name:

Email:

DIRECT REPORT 7

First Name:

Last Name:

Email:

DIRECT REPORT 8

First Name:

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Last Name:

Email:

DIRECT REPORT 9

First Name:

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Last Name:

Email:

DIRECT REPORT 10

First Name:

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Last Name:

Email:

DIRECT REPORT 11

First Name:

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Last Name:

Email:

DIRECT REPORT 12

First Name:

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Last Name:

Email:

DIRECT REPORT 13

First Name:

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Last Name:

Email:

DIRECT REPORT 14

First Name:

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Last Name:

Email:

DIRECT REPORT 15

First Name:

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Last Name:

Email:

DIRECT REPORT 16

First Name:

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Last Name:

Email:

DIRECT REPORT 17

First Name:

Last Name:

Email:

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DIRECT REPORT 18

First Name:

Last Name:

Email:

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DIRECT REPORT 19

First Name:

Last Name:

Email:

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DIRECT REPORT 20

First Name:

Last Name:

Email:

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DIRECT REPORT 21

First Name:

Last Name:

Email:

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DIRECT REPORT 22

First Name:

Last Name:

Email:

□

DIRECT REPORT 23

First Name:

Last Name:

Email:

□

DIRECT REPORT 24

First Name:

Last Name:

Email:

DIRECT REPORT 25

First Name:

Last Name:

Email:

Other Group Information

Please note: The "Others" group is available for you to identify a **group** of individuals from whom you want input in addition to your manager, peers, and direct reports. An "Other" group could be a group of internal customers, a group of external customers, the members of a committee or project group you are a part of, a group of senior leaders with whom you interact on a regular basis, etc. You can define what this group will represent, but it is important that *the individuals who you add to the group are similar to one another in terms of the contexts/ways you interact with them*. Therefore, we would NOT RECOMMEND that you invite a mix of senior leaders, external customers, and committee members.

You are required to invite a **minimum of 5 Others** (in order to maximize the likelihood that you will receive the minimum 3 responses required to receive results). You can invite up to 12. The insights you receive from these individuals WILL be anonymous.

OTHER 1

First Name:

Last Name:

Email:

OTHER 2

First Name:

Last Name:

Email:

OTHER 3

First Name:

Last Name:

Email:

OTHER 4

First Name:

Last Name:

Email:

OTHER 5

First Name:

Last Name:

Email:

OTHER 6

First Name:

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Last Name:

Email:

OTHER 7

First Name:

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Last Name:

Email:

OTHER 8

First Name:

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Last Name:

Email:

OTHER 9

First Name:

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Last Name:

Email:

OTHER 10

First Name:

□

Last Name:

Email:

OTHER 11

First Name:

□

Last Name:

Email:

OTHER 12

First Name:

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Last Name:

Email:
