

## HR Facilitator's Guide

# STAFF PERFORMANCE AND GOAL CALIBRATION

### What is calibration?

- **Goal calibration:** A process led by supervisors that can be incorporated into a regular team meeting. Team members read their goals, supervisors listen for a similar level of challenge and opportunities to provide employees experiences they haven't received to date. All team members listen for collaboration opportunities, overlap and suggestions.
- **Performance evaluation calibration:** A forum led by HR or leadership, as part of the performance evaluation process. Supervisors and senior leaders discuss ratings and their rationale.

### Why calibrate goals?

- **Aligns priorities.** Creates alignment between employee and unit priorities.
- **Fosters equity in developmental opportunities.** Allows supervisors to reflect on equity in providing each employee opportunities to stretch and develop respectively. Allows team visibility into areas for collaboration.

### Why calibrate performance?

- **Builds a shared frame of reference.** Creates consistency in standards for evaluating employee performance.
- **Mitigates biases.** Allows additional perspectives for more informed decisions, which can mitigate bias in both the process and outcomes.
- **Increases talent visibility.** Allows supervisors to gain broader insight about talent within the unit and/or college to plan and make future talent decisions.
- **Combats rating distortion.** Increases consistency and accuracy in the performance management process by ensuring that employees are evaluated on the same criteria and considerations regardless of to whom they report.
- **Increases Confidence.** Increases supervisors confidence in the rating assigned after having discussed it during the calibration conversations (since decisions have been reviewed and confirmed by a group of peers) allowing the supervisor to navigate potentially difficult performance evaluations better. Also likely to increase employee confidence in the fairness and accuracy of performance evaluations across employees.

### When do you calibrate?

- **Goal calibration** is done by supervisors annually as the performance management cycle starts, after employee goals are set.
- **Performance evaluation calibration** is done after supervisors have written employee evaluations, yet prior to finalizing and sharing with employees.

## **Facilitating Performance Evaluation Calibration**

### **1- Prepare Senior Leadership**

- If implementing the process for the first time, provide an overview. Use data suggestions below as needed to garner support. Ask leaders to participate in a kick-off information session.
- Create awareness of consistent standards you are trying to establish that also support flexibility, wellbeing, and a work environment that is culturally inclusive.
- Determine appropriate groupings of supervisors, establishing as many calibration forums as needed.

### **2- Prepare Employees and Supervisors**

- Communicate process and intentions to employees using template.
- Invite supervisor participants to a calibration training workshop and their respective calibration forum.
- Conduct performance evaluation calibration workshop using template.
- Conduct preparatory data analysis from suggestions below.

### **3- Facilitate**

- Define purpose of calibration and revisit expectations..
- Review definitions of ratings.
- Prompt supervisors to share employee ratings and (succinct) summary of how their performance met the rating criteria, *including* feedback/input collected.
- Navigate and provide direction when there is disagreement.

### **4- Analyze impact**

Outside of the forum examine performance rating data. Take from the following ideas or conduct other analyses you find helpful. Some of these are helpful to do prior to the session itself. Address concerns proactively.

- distribution of scores in respect to employee diversity
- averages across employee groups and between individual contributors versus supervisors (there's a tendency of inflating higher in hierarchy)
- percentage of "exceeds expectations" (should be somewhere between 10-20% if we are stretching and evaluating our employees objectively)
- Distribution of scores amongst levels of hierarchy (are ratings higher for higher levels in the hierarchy?)
- distribution (%) of scores per supervisors
- employee scores over the course of a couple of years (it should be unlikely that an employee consistently "exceeds expectations")
- known employee performance issues not reflected in ratings

### **5- Provide Next Steps**

- Supervisors adjust based on calibration feedback and deliver performance evaluations to employees.
- Supervisors discuss evaluations with employees.

## **Tools and Resources for HR**

All communication and workshop templates can be found in the [Talent Management Toolkit](#) including:

- Email template: goal calibration prompt to supervisors
- Email template: calibration transparency to all employees
- Email template: inviting supervisors to performance calibration and training session
- Workshop template: calibrating performance evaluations