

Calibrating Performance



What is calibration? Calibration is a two step process that includes supervisors who are responsible for conducting performance evaluations, the reviewers who examine the employee evaluations, and the executive to whom these individuals report. The calibration process provides a forum for discussion of employees' performance with the goal of making sure supervisors apply similar standards for all employees and eliminate biases to the greatest extent possible (refer to the [Resource Guide to Performance Management](#) for Supervisors at for a description of common rating errors.) Calibration relies on an honest and confidential dialogue among supervisors, reviewers and the responsible executive.

What are the benefits of calibrating performance ratings? Calibration:

- ensures supervisors are well versed in the definitions and application of the rating scale;
- helps supervisors have well thought through reasons as to why they gave a particular rating to an employee;
- helps prepare supervisors to have better performance discussions with their employees;
- provides supervisors with more confidence in their ratings after discussing the rating in a calibration meeting;
- ensures a more consistent and fair evaluation of an employee's performance by identifying potential supervisor and reviewer biases; and,
- aids our new pay for performance process by allowing us to be confident in our differentiation of performance levels.

When does calibration occur? Calibration occurs after a supervisor has sent an employee's completed evaluation to the reviewer and BEFORE the reviewer signs and returns the evaluation to the supervisor. In all cases, calibration occurs before signed performance evaluations have been shared with employees.

The Calibration Process. Calibration occurs in two steps. Each is described below.

Step 1. Upon completion of employee evaluations, and prior to the supervisor's signature, the evaluations are sent electronically to a reviewer. The reviewer is usually the supervisor's manager, but that may vary in certain schools and departments.

The reviewer reads each evaluation, looking in particular for constructive supervisory comments and ensuring evaluations are thorough and logical. If the reviewer decides a supervisor should alter a particular evaluation, the reviewer sends the evaluation back and waits for revision.

Once all employee evaluations have been examined and agreed upon by the reviewer – and any necessary changes are made, then a meeting is scheduled between all school/department reviewers and the school/department’s responsible executive.

Step 2. The HR Partner runs ratings distribution reports. The executive calls a meeting with all the reviewers, and the HR Partner who brings (or may pass out in advance of) the reports to the meeting. In this meeting, the participants look at ratings distribution for the entire school/department and ensure the ratings are being consistently and fairly applied to all employees, and that no single supervisor is giving all employees the same numeric rating.

The group may ask questions about specific ratings and may suggest adjustments based on their experience with the employee. Following the discussion, reviewers send any evaluations requiring revision, back to the supervisor. After the supervisor makes the revisions, the evaluation is sent again to the reviewer for signature.

The reviewer signs the evaluation electronically and sends it forward to the supervisor who also electronically signs the evaluation, meets with the employee to discuss the evaluation, and then sends it forward to the employee for their electronic signature. The annual process is then complete.

Tips for a Successful Calibration Process

- **Communicate School/Department Goals.** Goals for each area should be communicated in advance and as thoroughly as possible so employees understand how their daily work contributes to the success of the school/department, and so that employees understand the measures on which they will be evaluated.
- **Include your HR Partner.** Having a neutral third party adds balance to the meeting and provides an important objective perspective which can lead to the identification and possible elimination of biases.
- **Educate supervisors.** They need to understand what calibration is, why it is necessary, how it works, and what their roles are.
- **Don’t hide the process from employees.** It could de-motivate employees, if the calibration process is seen as secretive. Be open about the process, but maintain confidentiality outside of the calibration meeting.
- **Don’t expect perfection.** The calibration process is imperfect because the people using it are imperfect. Each calibration meeting should have checks and balances built in so leaders are held accountable for their evaluation decisions.
- **Get the right people involved.** Make sure that the reviewer can adequately represent the employees being discussed by articulating what that employee has accomplished and can

respond appropriately to questions or challenges from the group. If questions arise, make sure the supervisor is available to clarify them.

- **Set appropriate ground rules for meetings.** Participants must feel open to challenge and debate. They must also feel comfortable asking their peers for advice if they need help in determining or communicating a rating.
- **Leverage the information gathered during the process.** The power of calibration goes beyond performance ratings. These discussions yield important insight into the University's talent pipeline and overall development needs.