Performance Review Calibration

Calibration of Performance Scores
Calibration is a process in which multiple managers come together for a discussion facilitated by regional directors or unit leaders to discuss the performance rating proposed for each employee. One key purpose of these meetings is to improve consistency of ratings across different managers for employees with similar job descriptions. Its (calibration) goal is to eliminate the issue of one manager's "easy" rating system versus another being a "tough" rater. The calibration process works to ensure managers share an understanding of the core competencies, are making objective assessments of employee behavior / past performance and begin to use similar language to describe similar levels of accomplishment when providing feedback. Managers hold each other accountable for effectively differentiating exceptional performance from those who competently carry out duties or need to improve performance. Improving the fairness and accuracy of performance reviews is important as ratings impact the compensation process.

Benefits of the Calibration Process

**CALIBRATION GETS EVERYONE ON THE SAME PAGE by providing a forum for discussion of individual performance and how to apply similar standards.**

• Review of what the different ratings mean ensures managers are well versed in the definitions and application of the rating scale.
• A more consistent and fair evaluation of an employee’s performance occurs as potential biases or rating errors are considered. (More on common rating errors on page 3)

**CALIBRATION LEADS TO BETTER PERFORMANCE DISCUSSIONS AND ON GOING COMMUNICATION BETWEEN MANAGER AND EMPLOYEE.**

• Structure of calibration discussion provides each manager an opportunity to highlight the accomplishments, strengths and development needs of his/her team members. It also provides managers a chance to gain insight into the perspectives of other managers regarding the performance of their employee.
• Managers gain confidence in their ratings after discussing the rating in a calibration meeting.
• Managers can take what they learn in the calibration session and use it to shape conversations with employees about their performance, even when a difficult conversation will be necessary.
• Encourages more well thought through performance reviews and ratings when the manager knows he/she must present to peer managers.

**OTHER REASONS**

• Provides greater legal defensability to the process
• Aides in distributing rewards through the Annual Merit Compensation process (AMCP)
Timing of Calibration Discussion and Confidentiality

- Supervisors (Managers) should completely draft the performance review on direct reports and be ready to discuss their ratings with their manager peers in a group setting.
- Calibration occurs BEFORE the manager returns the performance review to the employee or meets to provide feedback.
- The information discussed and the resulting outcomes should be kept confidential by all managers involved.

The Calibration Process

- Each manager presents about their employee
- Explanation/rationale behind the rating
- Suggested items to include:
  - progress on goals and rating
  - performance on key job duties and rating
  - core competencies (discuss any with low or high ratings)
  - final rating and major summary comments

- Peers listen to presentation
- Group discussion and feedback
- Ask questions about specific rating and interpretation of ratings
- Makesuggestions on adjustments based on their interpretation of the review or experiences with the employee
- Manager makes notes on potential changes to the employee reviews; ways of describing the performance

- Consider current Extension guidelines for each ratings category
- Review overall ratings
- Adjust ratings as necessary, to accurately reflect shared expectations
- Regional Director (or other senior leader) guides toward alignment of ratings across the region/job category.
- Administrator facilitating makes final decision when group cannot agree.

- Unit heads update each performance review based on the feedback from the calibration discussion.
- Signs finalized review

- Meeting with employee to discuss the final review occurs

Presentation of Employees
Discussion and Feedback
Finalize Ratings
Update Reviews
Employee Review Meeting

Employee Review Meeting
- Meeting with employee to discuss the final review occurs
TIPS FOR A SUCCESSFUL CALIBRATION PROCESS

• Get the right people involved. Calibration meetings are facilitated discussions among the managers or leadership team to create alignment on the appraisal scores and feedback to be given to direct reports. Managers need to be prepared to represent the employees being discussed by articulating what that employee has accomplished and to respond to questions or challenges from the group.

• 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. Important ground rules include: (1) listen actively; (2) advocate when you feel strongly; (3) be open and honest in discussions, including respectfully challenging others; (4) don’t expect agreement - seek alignment and consistency; (5) maintain confidentiality of discussions post calibration.

• Facilitate the process. Facilitator (Regional Director or Unit Leader) of calibration process needs to assure that all employees are fairly represented during the calibration meeting. Some highly outspoken managers are persuasive and get their people rated higher while others who are less comfortable with the process don’t advocate for their employees. The role of the facilitator is to guide conversations so discussion is balanced and the skills of the presenter do not inflate or harm the outcome for an employee.

• Begin the process with outliers. High or low ratings are usually easier to discuss. Toughest calls are for employees who are in the “often exceeded” or “fully met” ratings. Time should be spent here to identify those who are truly above expectations.

• 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.

• 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. You may not get agreement but it is important to get alignment.

• 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.

Learning From the Calibration Process – Common Rating Errors
All involved can learn from the process. Consistency in performance ratings and developing a shared view of organization culture and expectations across counties and units is hard work. The calibration process can help managers with different backgrounds and viewpoints become more thoughtful in their assessments based on feedback from other managers. Calibration can help eliminate some of the common rating errors which the The Office of Human Resources at OSU identified.

• Halo Error – Appraiser giving favorable ratings to all job duties based on impressive performance in just one job function.
• Horn Error – Downgrading an employee across all performance dimensions exclusively because of poor performance on one dimension.
• First Impression Error – Developing a negative or positive opinion of an employee early in the review period and allowing that to influence all later perceptions of performance.
• Recency Error – Allowing performance at the end of the review period to play too large a role in determining an employee’s ratings for the entire period.
• Leniency Error – Consistently rating someone higher than is deserved.
• Severity Error – Rating someone consistently lower than is deserved.
• Clone Error – Giving better ratings to employees who are like the rater in behavior or personality.
• Spillover Error – Continuing to downgrade an employee for performance errors in prior rating periods.

Adapted with permission from:

References