

Give Performance Calibration a Try



Performance calibration is simply a way to ensure alignment and consistency when rating each employee's performance—all done through interactive conversations with managers. This is an effective strategy when reviewing the performance of many employees in a given department, division, or unit in an organization, where there are several managers reporting to a senior leader. Performance calibration can provide a “common lens” through which to evaluate employees. It provides more consistency in ratings among different managers. It allows for additional perspectives and opinions about an employee's performance from other managers. And, when an organization conducts performance calibration sessions system-wide, it creates a much more effective and realistic performance management system.

HR plays a key role in the performance calibration process. Here's how you do it:

1. Identify the key components of your performance evaluation tool. What areas are employees provided feedback on? Goals, key functions, values, competencies?
2. Determine what “meets,” “exceeds,” or “below” expectations looks like in each of the areas. What behaviors will signal that the expectation has been met? For example, exceeding expectations on goals might be completing all goals on time and taking on additional goals mid-year resulting in a substantial impact to the organization. Meeting expectations might be completing all goals on time. Below expectations might be failing to meet targets at specified time frames and not completing all goals.
3. Share these definitions with your managers. Get feedback to ensure you share a common definition of what “exceeds,” “meets,” and “below” expectations looks like. (Note: You can use this process with any of your rating scales—it is not just limited to performance expectations ratings.)
4. Have managers complete the performance evaluations and assign a final rating. Have them “hold” on delivering the evaluation to the employee until after the performance calibration meeting.
5. Schedule the performance calibration meeting. Share the purpose of the meeting.



Effective performance management is a must in every organization. A successful performance management process involves multiple components such as establishing expectations with employees, observing and monitoring employee performance, providing ongoing and timely feedback, and addressing performance concerns that may arise. All along the way, human resources professionals help leaders ensure conversations and documentation occurs.

A performance evaluation should never be a surprise. In order to achieve this, managers need the ability to provide comprehensive and honest feedback. It's more than just “going through the process” or copying and pasting similar feedback from prior year evaluations. It's about truly evaluating what it means to be meeting, exceeding, or performing below expectations. It's about distinguishing performance accurately among employees, rather than rating everyone the same. That's where performance calibration comes in.

6. At the meeting, serve as the facilitator. Define any ground rules. Allow each manager time to discuss the overall ratings of their employees. Sometimes it is easiest to review ratings for employees receiving an “exceeds” expectations or “below” expectations—since the majority of employees will “meet” expectations. If the manager rated the employee as “exceeds” expectations, then the manager should be able to articulate why the employee was rated at this level. The manager should be able to share how the employee went above and beyond in performance and have specific facts and documented conversations to support this. The manager should also provide those documented facts for employees rated as “below” expectations. The manager should be articulating the fact that the employee received corrective or disciplinary action during the evaluation period or failed to meet goals.
7. Encourage open dialogue and feedback sharing among managers. Ultimately, the employee’s manager makes the final decision on the rating, but should consider the thoughts of their peers. Keep in mind that comments from peers should be supported by direct evidence.
8. Ideally, the ability to track ratings over time can be very useful in sharing trends and patterns with performance that you, as the HR professional, can also use to inform the process. Keeping a simple spreadsheet with the year, a list of employee names, and the overall rating is all you need. If employee “A” gets an “exceeds” expectations year after year, you may want to dialogue with and challenge the manager to consider how he or she is raising the bar on performance each year. Similarly, if employee “B” gets “below” expectations for three years in a row, you may want to dialogue with the manager on why the employee is not meeting expectations year after year and establish a plan to aggressively manage performance.


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Keep in mind this process may require a shift in practice that some managers will welcome willingly, while others will be resistant and skeptical. It can be a very effective process to create greater levels of consistency among managers and reflect true, honest ratings.

When Human Resources can provide guidance on how to structure the process, lead the process, offer opinions (because we have them in HR!), and track trends over time, we are able to provide value-added HR that organizations desire.

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