Performance Management

Calibration Meeting Guide

January 2022



AGENDA

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- Purpose of the Calibration Session
- Structure of the Meeting
- General Guidelines
- Discussion of Employee Performance
- Summary of Results

Purpose of the Calibration Session

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- Allows for additional opinions and perspectives of an employee's performance which creates a more accurate final rating.
- Allows managers to explain the reasoning for their performance ratings which produces ratings that are more consistent across the business unit.
- Ensures that we differentiate performance within each business unit and across the organization. Supports the company's pay for performance philosophy.

Structure of the Meeting

1) Discuss Employees with the Highest Ratings
   - Top Achiever
   - High Contributor
2) Discuss Employees with the Lowest Ratings
   - Improvement Needed to be a Successful Contributor
   - Did Not Meet Performance Expectations
3) Discuss Employees in the Middle who are on the Edge
   - Rated Successful but are close to being rated a High Contributor
   - Rated Successful but are close to being rated an Improvement Needed
4) Capture Results from Meeting
   - Rating changes, areas of development

General Guidelines

- Managers can comment on an individual's rating only after the employee's manager has completed their presentation.
- Managers must have current and direct knowledge of the employee in order to engage in discussion (e.g., project work, contributions, attitude and behaviors toward peers and subordinates).
- Managers should not reference information from previous performance cycles (the overall rating will be used to determine compensation recommendations for 2025 performance).
- All anecdotal evidence provided by managers must be supported by evidence.

Potential Rating Biases/ Negative Influences

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Be aware of potential rating biases. Ensure you support your ratings with examples and proof. Avoid these pitfalls:

Central tendency	• gravitation towards the middle of the scale, regardless of disconfirming data
Halo/ Horns Effect	• generalizations about performance based on a small aspect of performance
Past Performance Error	• when previous performance incorrectly influences current evaluation
"Recency" Effect	• when recent smaller events take more weight than bigger but more distant work
Similar-To-Me Effect	• giving higher ratings to those who resemble the rater in appearance or in thinking/behavioral style
Stereotyping	• generalizing across groups, ignoring individual differences

Performance Ratings and Definitions

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Rating	Definition
Top Achiever	• Routinely exceeds expectations • Is self directed; expertly skilled • A role model
High Contributor	• Frequently exceeds expectations • Demonstrates high-level skill, initiative, and productivity
Successful Contributor	• Routinely meets expectations and may occasionally exceed expectations
Improvement Needed	• Performance approaches job requirements but does not fully meet expectations • Some improvement is needed
Did Not Meet Performance Expectations	• Performance does not approach job requirements and is below expectations • Sustained improvement is required

Appendix

- Manager Pre-Meeting Preparation
- Employee Presentations – Suggested Information
- Competencies / Leadership Behaviors by level (hand out)

Manager Pre-Meeting Preparation

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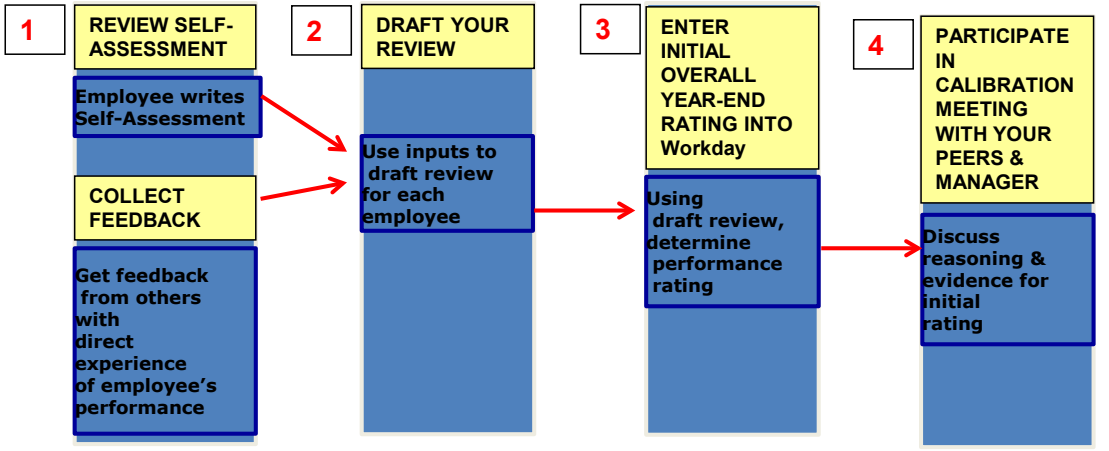
- **Prepare your review of your employee with specific examples & assign initial rating**



Employee Presentations – Suggested Information

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- Employees in the Top 2 Rating Categories
  - Brief Background of Employee and Key Accomplishments
  - Discuss Primary Strengths and Primary Development Opportunities
  - Rating Discussion / Rationale
- Employees in Bottom 2 Rating Categories
  - Same as above
  - Areas of development, and why employee is rated in one of the bottom two categories. Is employee in the right position? What can be done to improve performance so he/she can move up to a successful rating? (Can discuss with HRBP separately)
- Employees in the Middle but on the Edge
  - Should they be moved up or down and why

Next Steps

- Make any changes to ratings agreed upon at the meeting in Workday
- HRBP will run a report with employee names and ratings and provide information on distribution of ratings for senior level review, if applicable
- Finalize written reviews (if applicable, modify ratings subsequent to calibration session and senior level review)
- Once all senior level reviews are completed, managers can begin meeting with employees in early February
- Start 2026 Goal Setting and Development plans for your team