PERFORMANCE MANAGEMENT SERIES

Part 2 | Calibration

WHAT IS CALLIBRATION?

Process by which supervisors compare performance ratings to ensure that the standards used to rate performance are balanced across the unit, college/school/division, and UMSL

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Like last year: Vice Chancellors will review proposed performance ratings across their units

New this year: Vice Chancellors will coordinate a calibration process across their units; the Justification Committee will calibrate across UMSL

WHY CALIBRATION MATTERS

Consistency

Equity

Growth

Accountability

CATCH COMMON ERRORS

- Rating annual performance is a difficult task

- Our brains naturally take cognitive shortcuts to make the task easier

- These shortcuts may result in errors

- Calibration can help catch errors

Distribution Errors
- Leniency
- Severity
- Central tendency

Generalization Errors
- Halo
- Horns

Time-Related Errors
- Recency effect

Personal Errors
- Similar-to-me

WHAT DOES THE SCORE MEAN?

1 – Needs Improvement

- Does not consistently meet all expectations
- Additional direction and support is required

1.5 – Reliably Delivers

- Consistently meets expectations
- Sometimes needs additional direction and support

2 – Reliably Delivers

- Consistently meets expectations and might exceed some expectations
- Requires little to no additional direction to achieve established responsibilities
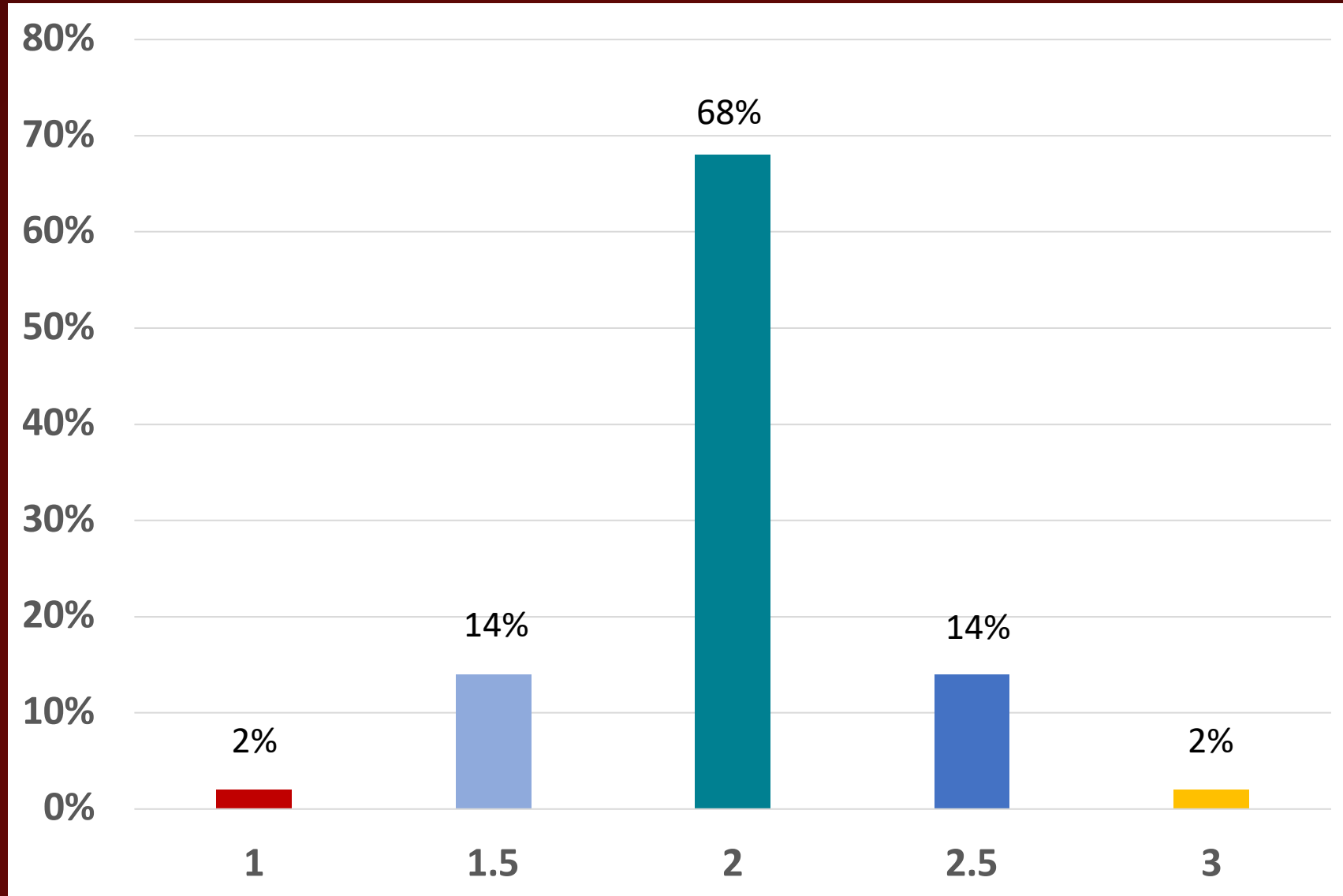
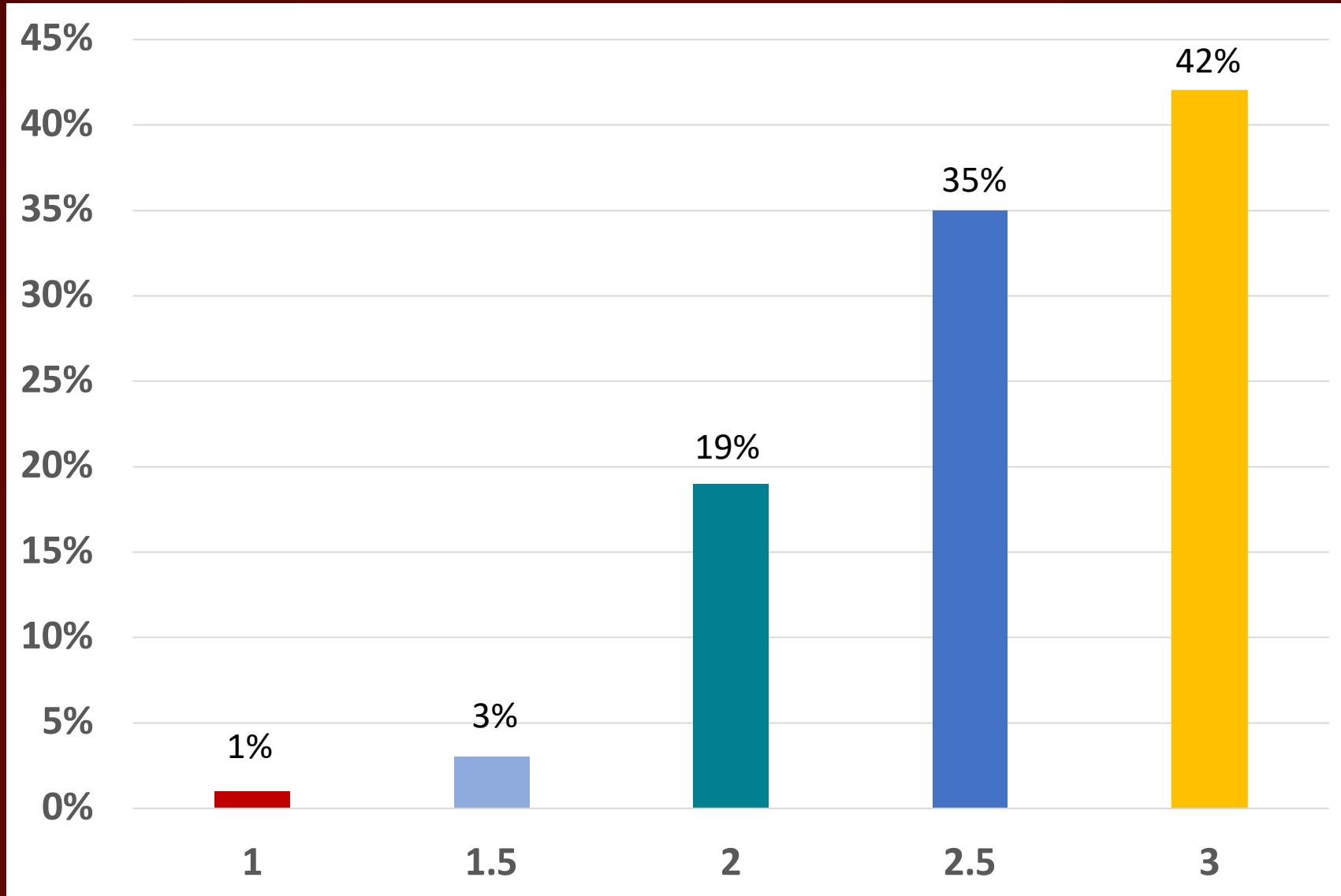## 2.5 – Reliably Delivers

- Frequently delivers beyond expectations

3 – Consistently Exceeds

- Consistently exceeds or delivers beyond expectations
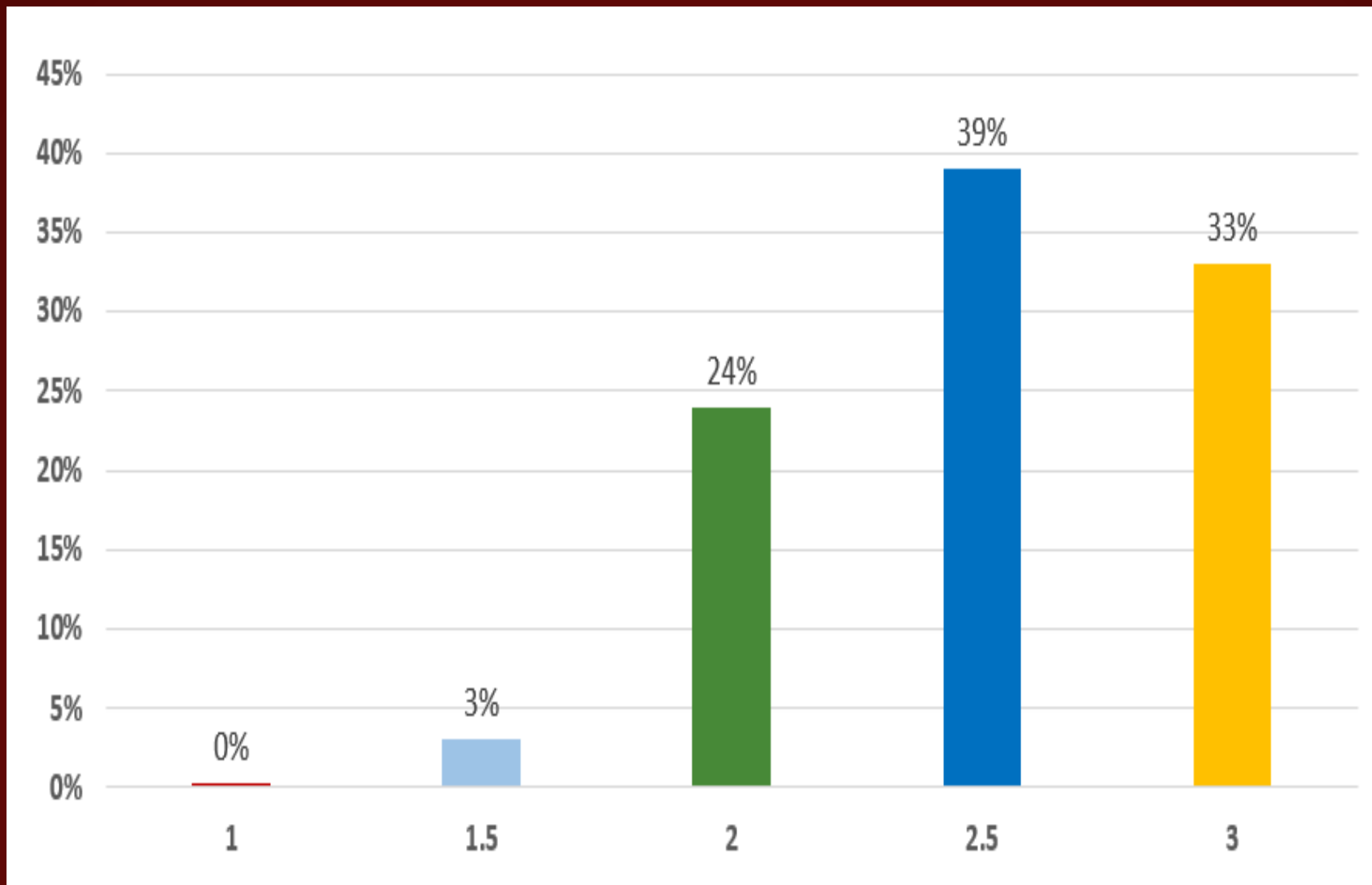- Influences others to perform better

TYPICAL DISTRIBUTION

UMSL 2022

UMSL 2023

POTENTIAL REASONS FOR THE DIFFERENCE IN DISTRIBUTIONS:

Questions to Consider:
Are employees frequently or consistently exceeding expectations?
Is the wording of the scale impacting ratings?
What are the expectations of supervisors?
Are there clear metrics from which to gauge performance?
Do expectations of employees drive performance scores?
Are supervisors using performance appraisals to serve another purpose?

COST OF MISCALIBRATION

Demotivates High Performers

Complicates addressing performance issues

Defeats the growth tool value

Creates difficulty in identifying who to recognize and compensate

MERIT BASED PAY INCREASES

The goal of merit-based pay is to reward performance, with employees with higher performance receiving the largest increases

Lower Score

Higher Score

HOW RATING DISTRIBUTION AFFECTS MERIT BASED PAY INCREASES

- We will have a set amount of money allocated for merit increases

- The total amount of money allocated to merit increases remains the same regardless of the rating distribution

- Thus, the rating distribution does not affect the total amount of money allocated – it effects *how* the total amount is allocated
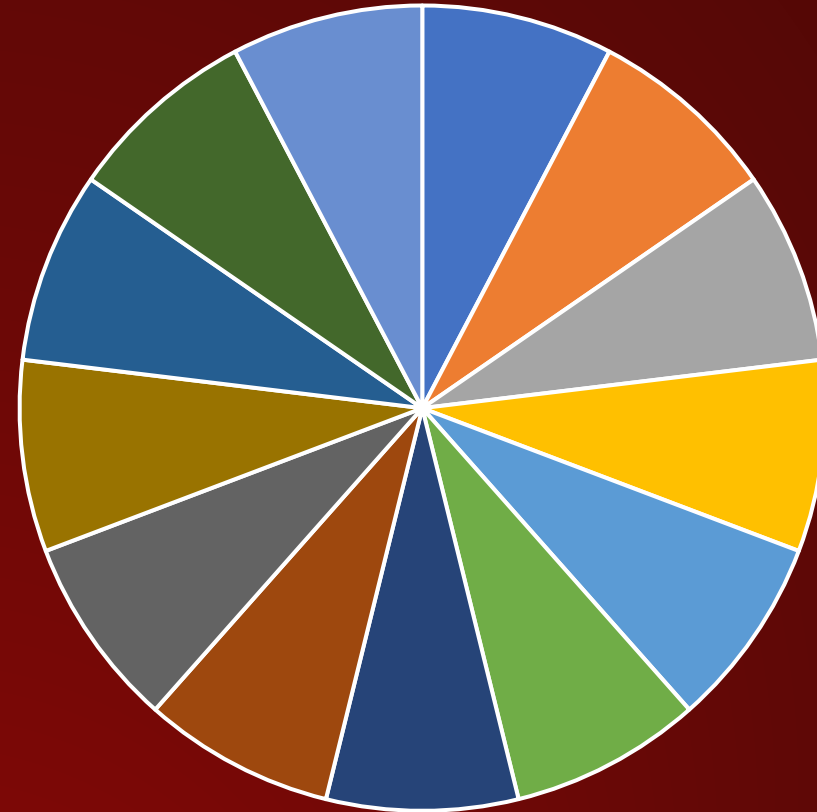
Discussion

What makes this challenging? What are your thoughts, reactions, and/or feelings about the content so far?

MAKING CALIBRATION MORE MANAGEABLE

- Model a growth mindset

- Create a shared understanding of the scale

- Focus on behaviors, skills, and performance

- Emphasize process rather than score

- Offer support

- Set clear expectations and metrics for performance going forward

TIPS FOR DEVELOPING CLEAR EXPECTATIONS AND USING PERFORMANCE METRICS

- Document clear expectations

- Identify the results expected for each role

- Measure progress toward individual goals

- Set metrics for different roles

- Set unit-level goals/metrics

- Gather feedback from key stakeholders

- Other ideas?

Establishing and communicating performance expectations supports clarity, transparency and equity.

PERFORMANCE APPRAISAL TIMELINE

Self Appraisals
- April 8 - 26

Supervisor Evaluations Drafted
- Begin anytime on/after April 8
- Finish draft by early May

Calibration in Units/CSDs
- Mid-May: Process and timeline defined by Vice Chancellors

Calibration with Justification
- Late May

Supervisor Evaluations Delivered
- Late May – June 14

Calibration Process: Vice Chancellors (Late May)

- Each Vice Chancellor will coordinate with unit leaders to review and discuss performance scores across units
  - Process will be established and communicated by the Vice Chancellor

- Vice Chancellor review will consider data such as:
  - Distribution of scores across all units
  - Distribution of scores of units in comparison to one another
  - Scores of individuals in each unit
  - Note that they may include others in the process such as Deans, Directors, Unit Leaders

- Justification review will consider data such as:
  - Distribution of scores across campus
  - Distribution of scores of units in comparison to one another

- Supervisors finalize ratings after this process is completed

- Process recommended in calibration:
  - Review the definition of the rating scale
  - Review the list of employees receiving lower ratings; Does this reflect your experience?
  - Review the list of employees receiving higher ratings; Does this reflect your experience?
  - Review the list of employees receiving a mid-point rating; Does this reflect your experience
  - Consider the list as a whole vis-à-vis the definitions; Are employees differentiated appropriately?

Discussion

Takeaway messages and/or lingering questions

NEXT IN THE PERFORMANCE EVALUATION SERIES

Part 3 – Understanding the Scale
Wednesday, April 24, from 12 – 1pm CT

Part 4 – Coaching Conversations
Wednesday, May 22, from 12 – 1pm CT

Part 5 – Panel Discussion
Early June

Part 6 – Continuing to Manage Performance
Late June

All Staff Performance Appraisal Series is underway, please encourage your reports to attend!