



# Goal Setting Calibration Discussion

The following reference guide outlines the structure of a goal setting calibration discussion. The goal is to ensure fairness and consistency amongst similar positions or general expectations for members of a unit. This should prepare you to create your performance plans for the upcoming cycle.

- **Pre-work:** The facilitator should be prepared to discuss priorities for the upcoming performance cycle based on information from university senior management or their own priorities for their team. The supervisors should be prepared to discuss priorities for the upcoming performance cycle based on the needs of their own team and suggestions from their employees.
- **Introduction.** At the beginning of the meeting, the facilitator explains the purpose of the session, the role of the facilitator, and the expectations for the participants.
- **Determine similar positions.** The team must decide which positions would be considered “similar” for the purposes of calibration. Remember that expectations for some institutional goals may be similar across many position types.
- **Discuss institutional goals.** The team should review each of the five institutional goals (*Expertise, Accountability, Customer-Oriented, Team-Oriented, and Compliance & Integrity*) separately. Use the three-column version of the institutional goals and come up with examples of how these levels might be demonstrated in the type of work that the employees do.
- **Define additional resources.** The team should clarify what additional resources are available for employees to explain performance expectations, such as policies, standard operating procedures, training materials, templates, etc.
- **Define individual goals.** The facilitator should review any strategic priorities from upper management, then provide each supervisor an opportunity to discuss priorities that they see in their own areas or across the supervisory group.
- **Define weights for goals.** Weights can be applied consistently across employee groups or can be left to supervisors to define separately based on specific needs.
- **Discuss talent development goals.** Particularly, discuss the amount of time and budget that can be provided consistently to support employee development opportunities.



# Rating Calibration Discussion

The following reference guide outlines the structure of a goal setting calibration discussion. The goal is to ensure fairness and consistency amongst similar positions or general expectations for members of a unit. This should prepare you to create your performance plans for the upcoming cycle.

- **Pre-work:** The supervisors should prepare draft ratings for each of their employees to be able to discuss during the meeting. There is a rating calculations spreadsheet that they can use to record these preliminary ratings. They do not necessarily need to write out comments at this stage, but for ratings of *exceeding expectations* or *not meeting expectations*, the supervisor must be prepared to explain why those ratings are justified or if there are any other external factors that have affected the ratings.
- **Introduction.** At the beginning of the meeting, the facilitator explains the purpose of the session, the role of the facilitator, and the expectations for the participants.
- **Discuss institutional goals.** The team should discuss each institutional goal separately. It is usually easier to discuss the higher and lower ratings first, then use that discussion to make decisions about the ratings that fall in-between.
  - Start with those employees who were rated at the *not meeting expectations* level. Supervisors need to explain why the employee is receiving the rating at this level and what documentation they have to support it.
  - Then, the discussion should move to employees who were rated at *exceeding expectations*, with supervisor explanations for the appropriateness of the ratings.
  - Lastly, the discussion should address employees who were rated at *meeting expectations*.
- Supervisors should politely challenge ratings that seem outside the expectations set at the beginning of the cycle or that lack sufficient justification. (This helps the supervisor to be able to write comments in the review and answer questions employees may ask later.) Ratings can be adjusted as needed. The facilitator/manager may need to make a final decision if there is wide-spread disagreement within the group.
- **Discuss individual goals.** If there are goals that are shared across employees, these should be discussed first, following the same process (*not meeting*, then *exceeding*, then *meeting*).
- **Review final overall ratings.** The team should next look at the overall ratings and address any that seem to be out of scope based on the conversation so far. Remember that employees who received disciplinary actions during the performance cycle or employees who received any rating of *not meeting expectations* cannot have an overall rating of *exceeding expectations*, regardless of their calculated score.