Every organization will hold a calibration session to identify performance differentiators by level and finalize performance ratings.

These facilitated sessions will produce ratings that:
- Are fair and accurate.
- Meet distribution requirements within the curve for groups of 75 or more.
- Identify high performers for compensation differentiation.
- Identify unsatisfactory performance to ensure appropriate action.

Prepare, prepare, prepare. Prior to a calibration session, you should think through your employee's accomplishments, strengths and weaknesses. (It is beneficial to have this in writing.) Some organizations prefer to share this with other participants prior to the meeting. Consider all appropriate sources for input - self-appraisal, client feedback, 360° Competency Assessments, etc. You should also have an idea of the preliminary rating for your employee.

Speak what you know. If you have don't have any direct experience with an employee, you should not offer feedback about their performance. Discuss first hand experience and facts, not what you've heard.

Adhere to the standards. There is no rule that stipulates a certain number of high ratings. If you fairly and accurately assign fewer Key and Quality Plus ratings than the distribution guidelines suggest, don't assign additional high ratings just to meet the guideline. At the lowest levels, some groups may legitimately exceed the guidelines and must be balanced by some groups that are below the guidelines. The objective is to assign ratings that are fair and accurate, keeping in mind the distribution guidelines that are expected to be met when your group is aggregated as part of a larger organization.

Hold yourself accountable for the success of the session. Agree to the ground rules at the beginning of the calibration session and stick to them. Add value to the discussion. If you don't have specific feedback to offer, ask good prompting questions. Focus on the performance differentiators. If your peers are getting off track, guide them in the right direction.

Keep confidences.

These are the steps you will take during the facilitated session to achieve fair and accurate ratings.

1. **Review of expectations:** Facilitator will review corporate standards, session expectations and desired outcomes.
2. **Reach agreement on Performance Standards and Differentiators:** Participants will discuss expected behaviors and those that differentiate high performance. This discussion will include behaviors important to the organization, as well as what defines “exceeding.” Then, there will be a level to level comparison, ensuring that weight and scope of responsibilities are considered regardless of job function. Once these standards have been agreed upon, they will be posted and referred to later in the session.
3. **Review Preliminary Ratings:** With the facilitator's assistance, you will share the preliminary ratings for each of your employees. In this way, you and the participants in your session can see the initial distribution for your organization.
4. **Calibrate:** The placement of employees in performance categories will be calibrated against...
   - Peers
   - High Performance Standards
   - Distribution Guidelines. If > 25% of the employees are placed above Quality Contributor, the variance should be justified or the differentiators used for high performers ought to be reconsidered. If <5% are below Quality Contributor, it is likely that the standards used for low performers need re-examination.

There should be two outputs from the calibration session:
1. An agreement on performance rating for each individual
2. An agreement on the performance standards and behaviors that differentiated the Key and Quality Plus Contributors.

After the session participants will receive the high performance differentiators agreed to in the session.

You should use this information when communicating performance ratings to your employees. By explaining the standards and differentiators, you give context to the rating. As a manager, you have a responsibility to own and explain the rating so the employee understands the fairness of the process.

It is important that throughout the year the behaviors that differentiate high performance are reinforced.

Performance Ratings: Educate, Calibrate, Communicate
Performance Appraisals (a free SkillSoft course)