# **Performance Rating Calibration Checklist**

Ratings calibration is a process used to gain greater consistency in how performance evaluation ratings are developed, delivered, and help increase the fairness of the final end-of-year evaluation overall rating. Performance rating calibration **must occur prior** to manager’s sharing their final ratings with the employees. Below is a checklist you can use prior to, during and after the Calibration meeting.

## Prior to the Calibration Meeting

[ ]  Each unit leadership will establish date for the calibration meeting that aligns with the published end-of-year activities.

[ ]  Managers should draft performance reviews for each of their direct reports and be prepared to discuss the ratings with substantiating comments.

☐ Each manager should provide a list of their direct reports and the proposed ratings to leadership.

[ ]  Unit leadership prepare rating distributions from previous years as reference.

## During the Calibration Meeting

[ ]  Set meeting expectations with participants – confidentiality, roles, responsibilities, and rules.

[ ]  Review rating norms - demonstrated behavior and outcome expectations.

[ ]  As a group, review exceptional or needs improvement ratings with a focus on:

* Consistent application of the ratings based on the established norms
* Identify and acknowledge unconscious bias that could impact rating decisions
* Time permitting, discuss successful contributors

[ ]  Track rating adjustments on the calibration worksheet.

## After the Calibration Meeting

[ ]  Obtain leadership approval for final ratings (this may vary by unit)

[ ]  Distribute final ratings to managers

[ ]  Manager should conduct final ratings conversations with all employees and submit the Manager Evaluation in Workday