

A Simple Approach to Calibration



For similar SHRA professions with varying responsibilities or priorities focus on the following:

- In terms of institutional goals, identify standards that are true for all or specific groups. Ensure that these standards are applied consistently when rating.
 - Goals Established After Calibration (bottom of page)
- Identify strategic goals for the cycle and specify any task responsibilities and expectations for meeting those goals for each unit, or supervisory team, as appropriate. This will be helpful for supervisors in establishing individual goals for their employees.

For the same SHRA positions, who accomplish the same or substantially similar tasks, across varying supervisors focus on the following:

- In terms of institutional goals, identify standards that are true for all or specific groups.
 - Determine how the institutional goals should be weighted for each specific job group identified. (Should be the same for all).
 - Weigh the goals in order of importance to the successful execution of the job.
 - Ensure supervisors recall and understand the performance standards set so these standards can be applied consistently when rating.
- Identify strategic goals for the cycle and specify any task responsibilities and expectations for meeting those goals for each specific job group.
 - Determine if these goals will be the same across each job group.
 - Weight goals in order of importance to meeting the strategic goals this cycle.
 - Ensure supervisors recall and understand the performance standards set so these standards can be applied consistently when rating.

Goals Established After Calibration (Sample)

Goal - Accountability (Coordination) & Team-Oriented (Attendance)

- Reporting Leave
 - Leave should be submitted in advance where possible. Any leave that cannot be submitted in advance should be submitted on the day of return.
 - Employees taking leave should ensure critical functions are covered and that their absence is communicated properly to the appropriate parties to ensure business continuity.
 - Compensatory time should always be approved by the manager before taken. Any procedures set forth by unit regarding compensatory time should be followed.

Goal - Accountability (Productivity) & Customer-Oriented (Attentiveness)

- Customer Response Time
 - All emails and phone calls should be responded to within 24 hours.
 - During high volume times units may adjust this standard with the permission of leadership but must have a standard message put in place to inform the customer of the extended wait time.
 - For example: Turn on Automatic Notifications to say. Due to [xyz time period], you may not receive a response to your email for up to 48 hours.

Goal - Expertise, Customer-Oriented, & Team-Oriented

- Teamwork & Cross Functional Knowledge
 - All department team members will be expected to learn the answers to basic questions across the unit so we can better help customers. Quarterly department meetings will be established so that fellow department members can present and communicate information about their respective jobs and processes.
 - The goal is to both educate each other, so we can better address customer questions about each area, but also give each other insight into other department areas with which an employee might want to learn more and possibly shadow and cross-train.
 - Teamwork will be evaluated through peer feedback to determine if teammates are taking the initiative to learn that surface level information and, when necessary, communicating it with customers.

- It is important that we collaborate with our teammates across units so we can help our department be more effective.

Strategic Goal - Knowledge Transfer

- Each unit should document at least one unit process to contribute to the department's goal of creating continuity and proper knowledge transfer processes or procedures.

Prepare for Your Calibration Session

Below are some more extensive tools & resources for the calibration process. Identify key points of the process and determine the best way to apply this exercise to your group. There are no one-size fits all process. The important thing is to identify your standards and apply them consistently across supervisory areas in your unit if appropriate.

- [Calibration Discussions: Creating Consistency Through Communication \(video\)](#)
- [Calibration Guide](#)
- [Calibration Discussion - QRG](#)

You can find the following calibration tools as well as other STAKES resources at our website - <https://hr.charlotte.edu/managers/performance-management>.