Performance Management
Calibration & Conversations
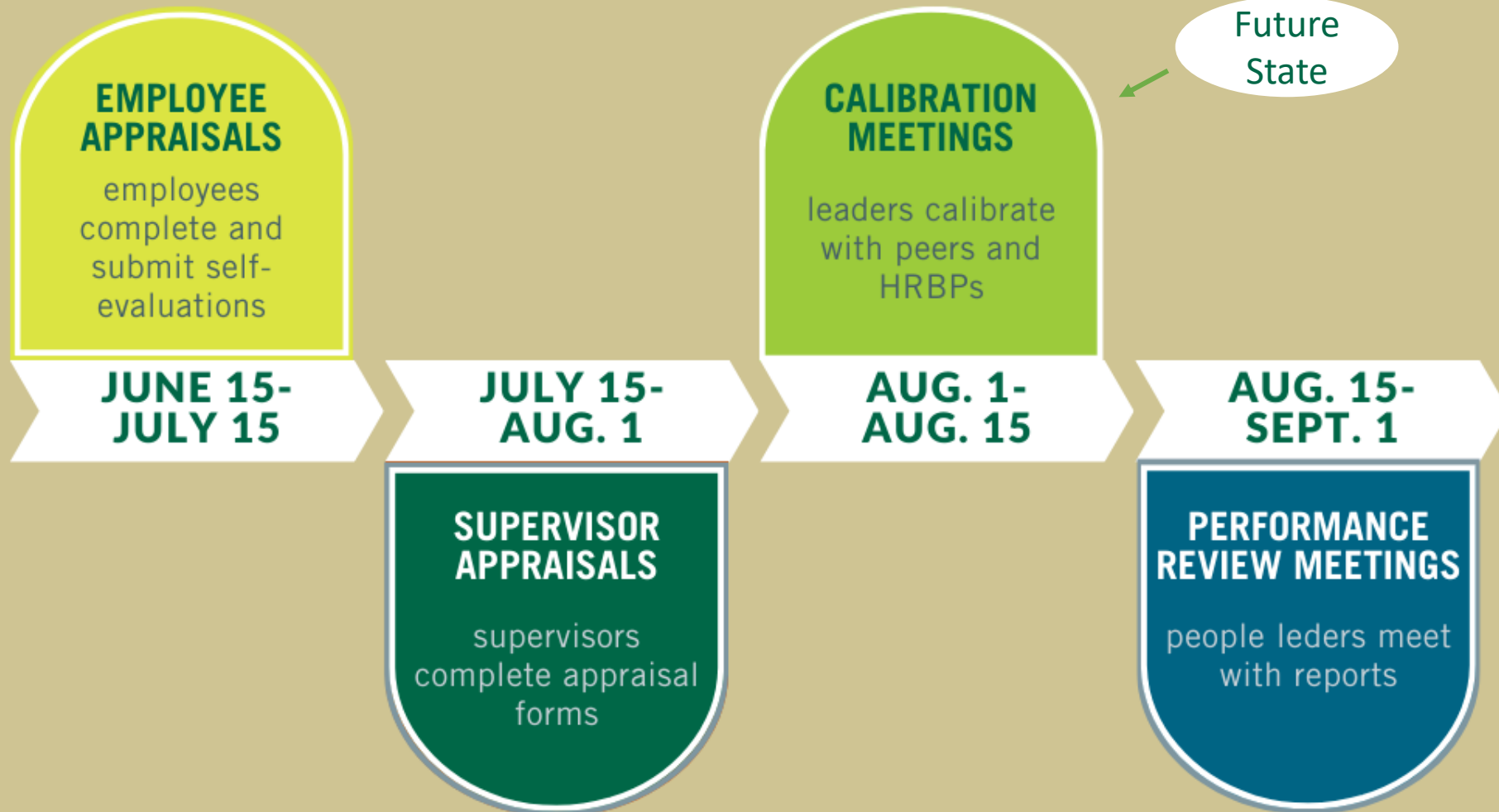
Session: 2

Facilitators: Jenna Bailie, Kim Lee Robinson & Nuria Coello Jamie

August 2023

USF Performance Management
Key Dates 2023

EMPLOYEE APPRAISALS

employees complete and submit self-evaluations

JUNE 15- JULY 15

SUPERVISOR APPRAISALS

supervisors complete appraisal forms

JULY 15- AUG. 1

CALIBRATION MEETINGS

leaders calibrate with peers and HRBPs

AUG. 1- AUG. 15

Future State

PERFORMANCE REVIEW MEETINGS

people leders meet with reports

AUG. 15- SEPT. 1

Performance Calibration

What is a 3 rating?

"Meets Expectations While Exhibiting University Values"

- **solid performance**

- **successful goal achievement**

[*A 3 rating is not a connotation of mediocrity]

What is Calibration?

A Performance Management process that helps to ensure that employees in like positions with like responsibilities are evaluated using the same methodology

Goals of Calibration

- Shared understanding of performance standards

  - Eliminate "traps" & align expectations

  - Ratings based on accurate, reliable, and objective data

- High level of transparency, consistency, and fairness

5 Talent "conversation starters"

1. How were their performance ratings distributed? – What % rated 1,2,3,4,5? Explore.

2. What steps did they take to eliminate traps? What ones did they recognize?

3. Did they use more qualitative or quantitative data to document? Share examples.

4. How did they ensure that they consistently applied the rating scale?

5. What examples of exhibiting the values (4 I's) did they identify?

What does Calibration "look" like?

- Leaders (+ their leader + HR partner) share and calibrate the outcome of their Performance Reviews.

- Leaders discuss/question each other to ensure they have applied the ratings consistently.

PERFORMANCE CALIBRATION MEETING

EACH LEADER PRESENTS THEIR TALENT

- Overall rating & rationale behind it

- Objective data used (*quantitative & qualitative*)

- Values demonstrated (or lack of)

PARTICIPANTS ASK QUESTIONS- HEALTHY DEBATE

- Objective data and ratings applied consistent with other leaders?

- Performance rating pitfalls or traps?

- Values fairly evaluated and consistently?

REACH CONSENSUS

- Consensus on all performance ratings

- Identify and make any adjustments needed to existing ratings

- Reflect on process, what worked? Opportunities?

Results of calibration

- Leaders better understand how to apply the rating scale consistently

- Leaders revisit their evaluations and amended original ratings *if needed

- Fairness and equity are increased across the university

- Values become more deeply embedded across all departments & teams

Performance Conversations

The art of meaningful discussions

PRE-DISCUSSION PREPARATIONS

1-2 WEEKS IN ADVANCE

Prepare notes:

- Data/metrics and KPI results
- Peer feedback

Determine setting and time:

- In-person v. virtual
- Ensure acceptable privacy
- Be conscious of noise level

IMMEDIATELY PRIOR

Eliminate distractions:

- Mute cell phone

- Set Teams status to DND

- Close email (unless for reference)

- Avoid multitasking!

- Ask the employee to do the same

HOLDING THE DISCUSSION

- Summarize objectives and goals for the year.

- Review performance and share examples of how they achieved/fell short of each goal.

- Discuss how observed behaviors contributed to/detracted from our Values.

- Provide overall rating.

LISTEN ACTIVELY 👂

- Be aware of body language and facial expressions

- Take notes

- Don't interrupt

- Don't react with high emotions

- Ask for a follow up meeting, if necessary

ENGAGE

- What did you learn while executing these goals?

- What might you consider doing differently?

- How might I better support you?

- Are there any obstacles that prevent you from being your best in this role?

CLOSING THE DISCUSSION

- Review any agreed upon next steps

- Reiterate how their work contributes to the big picture (department goals/strategy + USF's mission/vision)

- Ensure the employee knows where to find resources

POST-DISCUSSION

- Keep the conversation going

- Develop a plan

- Discuss personal development and career growth

- Begin outline of SMART goals

Fundamental Feedback

FUNDAMENTAL FEEDBACK

1. Be direct but not harsh.

2. Be specific and use examples.

3. Focus on their performance, not their person.

4. Remind them that constructive feedback helps build a stronger team.

5. Focus on actions that will help them improve.

EXAMPLES

INSTEAD OF…

- You're too slow and you're falling behind in your work.

- You're not upholding USF's values.

- Taylor's colleague's boss' peer told me that you were failing to deliver results.

TRY…

- I've noticed you've struggled to meet deadlines. Let's talk about what's blocking you.

- On our call yesterday, you referred to a team member as "pushy". Let's talk about our values and how they impact us and our team.

- I have reviewed your project's progress and you are not meeting objectives in three key areas: [list specifics]

BEST PRACTICES

DON'T

- Use the "compliment sandwich"
- Sugarcoat tough messages
- Pile it on
- React without a pause
- Allow the conversation to derail

DO

- Convey positive intent
- Show empathy
- Listen actively
- Encourage dialogue
- Follow up

Post Performance Review Checklist

- Performance Reviews signed by employee and emailed to:

Tampa campus: AS-HR@usf.edu

USF Health: HR-healthevals@usf.edu

St. Pete campus: stp-hr@usf.edu

Sarasota Campus: sar-sarasotahr@usf.edu

- Begin PIP for reviews that resulted in an overall 1 or 2 rating

- Create upcoming year's performance goals

1. Review resources **Employee Success Center** >
   Performance Management

2. Engage in Talent Calibration with Peers

3. Hold Performance Review Conversations

4. After reviewing the FAQ document, send your questions
   to **training@usf.edu**

CALL TO ACTION