

A guide to performance calibration



Introduction

This guide has been designed to give you an understanding of what calibration is all about and how we do it.



Why do we calibrate?

Calibration is all about managers coming together to talk about colleague performance and ensure that the ratings are applied consistently and fairly

- Everyone involved in the calibration are clear on what the ratings look like
- Managers and colleagues have a shared responsibility to have regular performance conversations, share information and feedback throughout the year in 121's, reviews and in day to day discussion - calibration should reflect these discussions

Getting ready to calibrate



Preparation

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This section is intended for Managers who will be attending calibration meetings to discuss their team's performance.

Before you attend the calibration meeting, make sure that you:

- Review the rating descriptors
- Reflect on the whole period for each colleague, referring to goals, Co-op Behaviours, mid-year review (if applicable) and 121s - think about what the colleague has achieved and how they have gone about it
- Use this information to prepare a few summary notes and apply a rating for each colleague

Remember

When applying ratings, focus should be on the impact of the individual rather than the time worked to ensure that colleagues are being measured on outputs rather than the time spent on an activity.

Calibration is not a talent session nor a discussion of potential, so the focus should be on thinking about performance for the whole period and applying a rating that reflects this.

Do you have any colleagues working part-time hours?

Do not be deterred from recognising what is exceeding or outstanding performance for someone who works reduced hours, simply because they are not at work for as long as others.

Time to calibrate

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In the meeting:

1. To keep things easy, go through the grades one at a time and think about examples of what you would expect to see at each of the rating levels – consider both the ‘what’ and the ‘how’.
2. Highlight all part-time workers, colleagues who have changed roles or are on secondment at the start of each calibration session.
3. Then display the ratings and where colleagues have been positioned against them e.g. on a whiteboard, or laid out on the table.
4. Give everyone a chance to review the ratings and reflect on where people have been positioned.
5. If anyone is unsure about the rating for a colleague then they should jot down some specific feedback about what exactly they have observed that would suggest that this should be a different rating.

The following questions may help to structure the feedback:

- Did this happen on one occasion or is it a more regular occurrence?
 - Did these things happen in the past 12 months?
 - Has the colleague had the feedback? If so, how have they responded to it?
6. Using the specific feedback, discuss whether this means that any changes should be made to the colleague’s rating.



Remember...

- Focus on the impact of the individual rather than the time worked to ensure that colleagues are being measured on outputs rather than the time spent on an activity.
- The only people commenting on colleagues’ performance are those who have had direct contact with that colleague or who have been impacted by the work that they have delivered. All input should be based on fact and direct experience rather than personal opinions.
- It’s really important that line managers take accountability for both owning the rating and sharing back any relevant feedback from the session with a colleague to aid their development going forward.



Rating performances

The performance rating needs to take into account the whole period that is being reviewed. If a colleague has spent time in more than one role during the review period then the review should reflect this. **Remember - the Year-end rating is looking back across the whole of the year not just the six months since the mid-year review.**

If a colleague has worked for more than one manager during the review period or matrix management is in place then input should be taken from each manager.

Secondments

If a colleague is on a secondment, the rating should be applied against their 'home' grade (as this is what their T&C's are based on).

Secondment example

Mo is a grade E colleague who is seconded into a grade D role. His rating should be measured against grade E as this is his home grade.

For those going on maternity or adoption leave, a formal review should be completed before they go and a rating based on the performance period they have worked agreed.

Maternity example

Julie went on Maternity Leave in July for the remainder of the year. Julie's performance before she left was Exceeding. Her Year-end rating is Exceeding.

Move roles in Co-op example

Kim has worked for 2 months in her new role and the rest of the year in a different role in Co-op where her performance was rated Good - Achieving. It's too early to say how her performance should be rated in a new role. Her Year-end rating is a reflection of the entire 12 months therefore Kim's final rating is Good - Achieving.

Performance ratings

Do you have any colleagues working part-time hours?

Do not be deterred from recognising what is exceeding or outstanding performance for someone who works reduced hours, simply because they are not at work for as long as others.

When applying ratings, focus should be on the **impact** of the individual rather than the time worked to ensure that colleagues are being measured on outputs rather than the time spent on an activity.

Performance ratings

Outstanding – consistently exceptional performance

- Colleague is an exceptional role model and champion of our Co-op Behaviours and Ways of Being, both inside and outside of their team, and demonstrates an ability to inspire and influence others through their behaviour.
- Colleague significantly surpassed the requirements of their role, making a significant positive impact and adding lasting value to the Co-op through their role.
- Colleague shows very high levels of effort by proactively taking on higher levels of responsibility and is seen as an excellent resource for providing guidance and support to others.
- Creates and role-models a culture of adaptability and resilience and leads by example.

Exceeding – consistently great performance

- Colleague is a role model for our Co-op Behaviours and Ways of Being, both inside and outside of their team.
- Colleague has made a positive impact and added value to the Co-op by consistently going above and beyond the requirements of their role.
- Colleague shows high levels of effort by taking on higher levels of responsibility with very limited or no supervision.

Achieving – consistently solid performance

- Colleague consistently demonstrates our Co-op Behaviours and Ways of Being in everything they do.
- Colleague has fully and consistently met the expectations of the role with little guidance and support and has made a valuable and effective contribution to our Co-op through their role.

‘Achieving’ performance should be viewed as good and solid performance.

Partially achieving – varied performance / building performance

- Colleague mostly but not consistently demonstrates our Co-op Behaviours and Ways of Being.
- Colleague has met some, but not all, of the expectations of their role and made mostly good contribution to our Co-op through their role.
- Colleague may be developing in their role and need additional support, coaching or feedback.

Not achieving – not meeting performance expectations

- Colleague has not demonstrated our Co-op Behaviours and Ways of Being and/or has not achieved the expectations of their role, resulting in poor contribution to our Co-op.
- Colleague has required significant additional management support and direction to improve.

Exceptions / Nil ratings

Nil Rating (A) - New to Coop

Should only be applied to colleagues who started after 1st October. Anyone who started before 1st October should get one of the main ratings.

Nil Rating (B1) - Career Break

Should only be applied if a colleague was out of the business due to a career break for more than 9 months in the performance year. Colleagues that have been working for 3 months or more in the performance year should get one of the main ratings.

Nil Rating (B2) - Maternity/Adoption/Extended Paternity Leave

Should only be applied if a colleague was out of the business due to a parental leave for more than 9 months in the performance year. Colleagues that have been working for 3 months or more in the performance year should get one of the main ratings.

Nil Rating (C) - Long Term Sickness

Should only be applied if a colleague was out of the business due to long term sickness for more than 9 months in the performance year. Colleagues that have been working for 3 months or more in the performance year should get one of the main ratings.

Nil Rating (D1) - Leaver

Should be applied to all colleague who have already left at the point of the review.

For almost all of colleagues you will be able to give one of the 5 main ratings. Nil ratings are only given in exceptional circumstances where there is not enough evidence to make a fair assessment.

Remember:

If you award a Nil rating, it may impact a colleague's eligibility for an Annual Salary Review and eligibility to participate in the Bonus Plan where applicable.



Improving performance

We all need to take ownership for achieving and maintaining great standards of performance. There may be times when this drops below what is expected for a variety of reasons. It is recommended that if a colleague has received 2 consecutive ratings below achieving, then the manager should contact ER services to discuss ways to support the colleague going forward.

The Improving Performance procedure is a framework to help support colleagues to achieve the right level of performance and make it stick going forward. More information is available in our People Policies pages on the Intranet.