ENGAGE 2.0

Using the "Director View" on the Evaluation Dashboard for an Effective Leadership Calibration Meeting

What is a leadership calibration meeting?

- Calibration meetings take place between the leadership in a given department or division.

- The goal of the meeting is to review evaluation data within each department/division to ensure there is a consistent approach across all supervisors.

- Leaders identify any patterns or outliers in the data that warrant additional action.

How to have a calibration meeting ("What? So What? Now What?)

Leaders want to learn from their ENGAGE 2.0 evaluation results. One way to do this is by having a facilitated discussion about the charts and tables in their dashboard. Choose a facilitator who can bring positive energy to the meeting. Someone who can create a safe and open space for participants to engage in discussion. Start by going through each of the prompts below. Make sure someone is a designated note taker at the meeting.

What?

Use your evaluation dashboard to understand the data for your department/division. Review each chart or table and ask, *What does this mean? What do you notice? What does the chart say?*

Helpful hints:

- Identify what org. level you need to drill down to in your dashboard to make meaningful comparisons. Use filters to look at data for specific work units.

- Think about what factors (geography, org. level, etc.) you want to know within the data.

> ### Key Resources
>
> - Evaluation Quick Reference Guide— Explains the goal of the evaluation, reviews each survey question, and gives a definition of the survey rating scale.
>
> - Evaluation Click Step Guide (SSO version and non-SSO version)— Explains how to log in and complete the survey form.

Guiding questions:

1. Are supervisor ratings consistent within divisions and/or across divisions?

2. Do your perceptions of team performance match supervisor ratings within the department/ division?

3. How do supervisor ratings vary by each survey question? Are their scores similar or different?

The goal is not to have the best evaluation scores, but to have the most accurate scores.

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So What?

Think about *why* the data matters. Why is it important? What patterns do you see? What hypotheses can you make? Are any conclusions emerging? Reflect on these questions. Use them to identify opportunities and risks to get more reliable, consistent, and accurate data for your department/division in the future.

Guiding questions:

1. What data trends exist across *all* work units?

2. Where are certain work units differing? Are some giving higher/lower evaluation ratings? Why do you think that is happening?

3. Do division ratings match division results? Why or why not?

> ## Want to explore your evaluation dashboard? Watch these videos!
>
> - Dashboard Training for Supervisors — Covers key features of the evaluation dashboard and also how to use the dashboard to have great ENGAGE conversations with team members.
>
> - "At Risk" Office Hour — Covers everything you need to know about the "at risk" question in your ENGAGE 2.0 Evaluation survey.

Now What?

The facilitator should ask, *what actions make sense?*
Talk about next steps and decide appropriate actions related to:

- Following up with supervisors in the department/division to help them with their ratings

- Giving rewards and recognition

- Improving key areas such as evaluation response rates, quality of evaluation ratings, etc.

> ## Need to follow up with a supervisor about their ratings?
>
> Share these three tips to help reduce rater bias and calibrate scores:
>
> 1. Rely on facts, not feelings. Reduce reliance on memory. Instead, take notes to document when a team member did/didn't meet expectations. Revisit these notes when you complete evaluations.
>
> 2. Rate against role requirements, not peer performance. The expectation for each person and role are different. Rate against the duties and requirements of the person's role, not how they perform compared to their peers.
>
> 3. Watch out for recency bias! Consider the person's performance throughout the entire period of appraisal.

Examples to show where calibration may be needed

Example 1: Supervisors Providing Inflated Scores

What?: "In this graph, people are averaging a 4. Scores are higher than expected."

So What?: "Scores seem too high/positive. They may be inflated and inaccurate. This doesn't show us where/how to improve."

Now What?: "We can work with this division's leadership to consistently define each rating scale item. Follow up next quarter."

## Example 2: Certain Classifications of Positions Trend Higher than Others
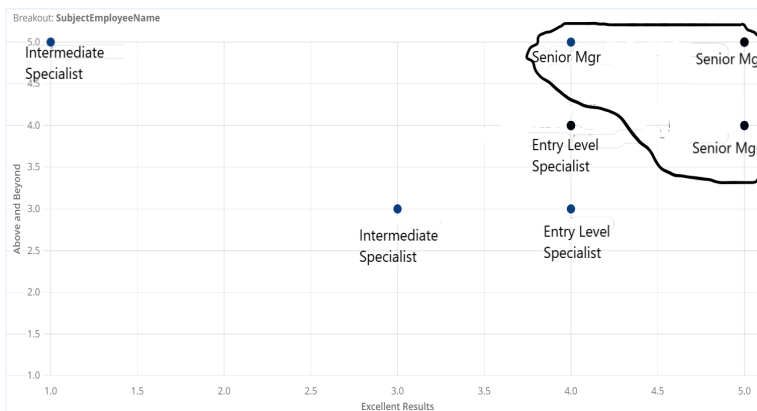
What?: "Senior Managers are being rated higher than Specialists."

So What?: "There may be inconsistency in the rating criteria we use between the two classifications of positions."

Now What?: "We can work with leadership in this work unit to examine the criteria they used to rate team members. Maybe we need to refine what it means to 'meet expectations' for each position type. We can adapt the criteria where needed to ensure clarity and consistency."

Example 3: Check in with Supervisors who Flagged Team Members as *At Risk*
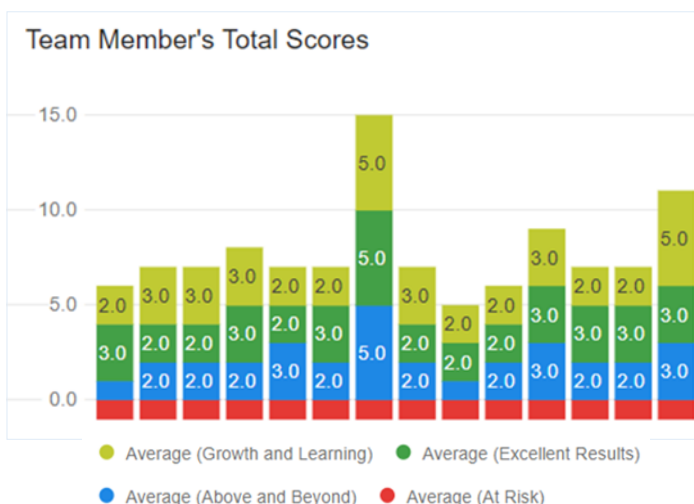
What?: "These supervisors flagged a team member as *at risk* for not meeting expectations."

So What?: "Not all *at risk* team members received low evaluation scores. We want to make sure each team member is accurately marked as *at risk*."

Now What?: "Let's make sure other information on the evaluation supports flagging these team members as *at risk*. We should also reach out to each supervisor to ask them how they are helping the team member get better."

After calibration is complete, remember to recognize top performers for their great work!