

CALIBRATION PREP SHEET (Manager Tool)

For use before every formal review calibration meeting (May, September, December–January)

Module 6 — Performance Leadership

SECTION A — Basic Information

Manager Name: _____

Department / Unit: _____

Calibration Cycle:

- ☐ May (Jan–Apr)
- ☐ September (May–Aug)
- ☐ December–Jan (Sep–Dec + full-year)

Number of employees included: _____

SECTION B — Required Documents (Tick Before the Meeting)

(Must be ready and in PeopleHR / Manager's evidence folder)

✓ Performance Evidence

- ☐ Evidence Log entries (3–6 per employee)
- ☐ Critical incidents (if any)
- ☐ Success indicators for EACH objective
- ☐ Notes from 1:1 meetings
- ☐ Any cross-unit feedback relevant to deliverables or behaviours

✓ Ratings (Draft)

- ☐ Draft ratings for Deliverable Objectives
- ☐ Draft ratings for Developmental Objectives
- ☐ Draft ratings for Competencies (based on behavioural indicators)
- ☐ Reasoning for each rating written in bullet points

✓ Supporting Documents

- ☐ Employee Self-Reflection

- ☐ Updated job description (if changed)
- ☐ Departmental Objectives + Dependency Map
- ☐ Any recognised cross-unit contributions

✓ **Optional Evidence**

- ☐ Partner or client feedback
- ☐ Project reports
- ☐ Training logs
- ☐ Collaboration records

SECTION C – Summary Table (One Page per Employee)

Use one table per employee.

EMPLOYEE: _____

Band: _____

Role title: _____

Component	Draft Rating	Evidence Summary (2–4 lines)
Deliverable Objective 1	___	_____
Deliverable Objective 2	___	_____
Deliverable Objective 3	___	_____
Developmental Objective	___	_____
Competency 1	___	_____
Competency 2	___	_____
Competency 3	___	_____
Competency 4	___	_____
Competency 5	___	_____
Competency 6	___	_____
Competency 7	___	_____

SECTION D — Calibration Justification Questions

(Bring this answered — it will be used during the meeting)

✓ 1. How does this rating compare to success indicators?

Write 2–3 lines:

✓ 2. What patterns did you observe across the cycle?

(Strengths, improvements, risks, consistency)

✓ 3. What behaviours support the rating?

(Use competency indicators)

✓ 4. Is this rating consistent with:

- People in the same band?
- People with similar job scope?
- The organisation's rating definitions?

☐ Yes

☐ No — explain: _____

SECTION E — Bias Self-Check (Must Complete Before Meeting)

Tick all that apply:

- ☐ I reviewed the whole cycle, not just recent events
- ☐ I used evidence, not impressions
- ☐ I compared ratings using success indicators, not personalities
- ☐ I challenged my own first instinct
- ☐ I checked for gender or cultural bias

- ☐ I considered the employee's scope and context
 - ☐ I verified that expectations match the band
 - ☐ I ensured fairness for remote / hybrid staff
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SECTION F – Discussion Points for Calibration

(Bring 1–2 max per employee)

Possible points to discuss:

- ✓ Rating differences across managers
- ✓ Clarity on success indicators
- ✓ Level-appropriate expectations
- ✓ Cross-unit contributions
- ✓ Competency demonstration
- ✓ Strengths clusters
- ✓ Development needs
- ✓ Potential risks
- ✓ Need for rating adjustment

Write your specific discussion points:

SECTION G – Post-Calibration Actions (Complete AFTER the meeting)

- ☐ Adjusted ratings where needed
- ☐ Updated Evidence Log
- ☐ Updated Manager Evaluation Notes
- ☐ Prepared evaluation language for the end-of-year review
- ☐ Noted development points to include in IDP
- ☐ Informed HR of any flagged risks
- ☐ Documented any clarifications about expectations