

The calibration decision record

Give every rating a defensible trail from business expectation to evidence, judgment and approval.

01 / Establish the decision boundary

Use this record for a role or a comparable role family. Agree the review period, objectives, measures and rating anchors before evaluating contribution. Record changes in scope or operating conditions rather than silently moving the target.

Control	Question to resolve before calibration
Role accountability	Which business outcomes could this role reasonably influence? Who owned the dependencies?
Evidence quality	Is the evidence dated, attributable and complete enough to support the judgment? What remains disputed?
Comparable standards	Were managers using the same rating anchors for comparable roles and periods?
Decision rights	Who recommends, calibrates and approves? Who can authorize an exception?

02 / Run the evidence conversation

Ask the manager to identify the strongest evidence, the material counter-evidence and the boundary of the role's control. Challenge recency, visibility and similarity bias. Capture the reason for a changed rating; a number without its rationale is an incomplete record.

03 / Keep the decisions traceable

Record the calibrated rating, development action, unresolved evidence and review owner. Review compensation separately against the approved reward policy, affordability and authority. A distribution chart is a diagnostic signal; a forced distribution should not replace evidence.

Operating template. Adapt the design to your role architecture, policies, data controls and applicable employment regime. This is not a legal determination or a validated assessment instrument.

One role. One period. One decision trail.

Record context	Complete before the panel	
Role / role family	-----	
Review period / objective version	-----	
Manager / panel / approver	-----	
Material scope or dependency changes	-----	

Objective and agreed measure	Evidence and limitation	Proposed rating / anchor
1. ----- -----	----- -----	----- -----
2. ----- -----	----- -----	----- -----
3. ----- -----	----- -----	----- -----

Calibration decision	Record the rationale, owner and next step
Final rating and rationale	----- -----
Disagreement or missing evidence	-----
Development action / owner / date	-----
Compensation decision / separate approval	-----
Decision date / approver / next review	-----

Store completed records only in the employer's approved HR system or controlled repository. Limit access to authorized reviewers. Keep sensitive medical, grievance or other protected information outside general panel circulation. Record the existence of a dependency without distributing unnecessary personal details.

Make the judgment visible.

Fictional example for a customer-support manager. It demonstrates the record format and makes no claim about an Element client or a prescribed rating model.

Objective	Weight	Evidence-based score
Service quality	35%	4
Response and resolution standard	30%	3
Capacity and backlog control	20%	2
Team capability development	15%	4

Illustrative weighted score: $(0.35 \times 4) + (0.30 \times 3) + (0.20 \times 2) + (0.15 \times 4) = 3.30$. Use only where a weighted model and anchors were agreed in advance. A composite score informs judgment; it does not automatically establish a final rating.

What the panel records

Decision field	Illustrative record
Manager recommendation	Rating 4. Strong service-quality outcomes and manager visibility.
Panel challenge	Capacity control was below the agreed standard. Separate a documented system outage from the recurring backlog the role could influence.
Calibrated conclusion	Rating 3 against the agreed anchors. Retain the quality result and explain the capacity gap; do not erase either.
Development action	Manager and operations lead agree a backlog-control cadence, dependency owner and review date.
Pay decision	Record separately under the approved reward policy and delegated authority. No pay award is implied by this example.

The management test

Could another authorized reviewer reconstruct what was expected, what happened, what the role controlled, why the judgment changed and who approved the outcome? If any answer is missing, the record needs another pass.

Build the system inside the business.

Element MEA supports goal architecture, performance reviews, calibration governance and manager enablement. Scope the decision gap with a senior practitioner.

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