



Assigning Weighting Factors

What Are Weighting Factors?

Weighting factors are estimated values indicating the relative importance or impact of each item in a group as compared to the other items in the group. The purpose of assigning weighting factors is straightforward... they help us establish work priorities. In the performance appraisal, they are part of the calculation used to determine an accurate overall performance rating.

The appropriate use of priority weighting factors for staff members is an important conversation between supervisor and staff member to reach understanding and agreement on work priorities for each performance management cycle. This conversation helps both staff member and supervisor understand workload, resource needs, and time commitments.

What gets weighted? Within the redesigned GPS appraisal form almost all elements will be weighted. These include key accountabilities, performance goals, and special projects/assignments. These elements appear within a single section of the form and cumulatively, the weightings must equal 100 percent.

Ideally, weighting factors should be established early in the performance cycle as part of setting expectations for the year. Weightings should be reviewed periodically and changed, as appropriate, to reflect shifting departmental priorities over the course of the year. Annual appraisal time provides an opportunity to adjust the weightings based on the overall contribution or impact of a particular element to the staff member's work performance.

What is the weighting based on? It may be tempting to assign a priority weighting based on the amount of time spent on a particular accountability and in some cases this may be appropriate. However, other parameters should be considered. For example:

- ◆ Is this accountability a critical process?
- ◆ How important is this project to the position, the department, the college or stem, the University?
- ◆ What is the impact and scope of the expected outcomes?
- ◆ Who is affected and how by this accountability or project?
- ◆ What are the consequences if this accountability or project doesn't happen?

Assigning Weighting Factors in the Online GPS Appraisal Tool

Nearly all elements of the redesigned GPS appraisal form may be assigned a weighting factor. For classified staff, all key accountabilities, performance goals, and special projects/assignments should be assigned a weighting factor based on the overall contribution or impact to overall work performance during the review period. Developmental/ Workplace Learning goals are not rated and therefore are not weighted.

NOTE: *Research personnel do not have key accountabilities, only goals established for their assigned projects.*

All items with an assessment rating should have a corresponding weighting factor assigned to them. Within the form, the element weightings must cumulatively equal 100 percent.

Items may be given a weighting factor of zero, if deemed applicable, and should have a corresponding rating of "0 – Not Rated," otherwise the overall assessment rating will be negatively impacted.

Example: Hypothetical Weighting Assignments for an Academic Coordinator

Performance Elements:	Weight
Key Accountability: Coordinate the graduate admissions process	30%
Key Accountability: Assist and advise undergraduate/graduate students	25%
Key Accountability: Provide administrative support for the department	15%
Key Accountability: Coordinate meetings and events	5%
Performance Goal: Help implement new system for tracking admissions	15 %
Performance Goal: Revise process documentation to incorporate new system	5%
Special Project: Provide admin support to departmental faculty search committee	5%
Assigned Weightings Total:	100%

In the summary section of the *GPS* appraisal form, the priority weightings and the performance ratings are used to automatically calculate an overall assessment rating.

Overall Assessment Rating Calculation

An example of how the ratings and weightings are used to calculate the overall assessment rating is shown below. Included in the example is the sample calculation on the next page.

Example: Hypothetical Appraisal Summary for Academic Coordinator

2013 Performance Elements	Descriptor Rating	Weights	Numerical Rating
Key Accountability: Coordinate the graduate admissions process	Fully Successful	30.0%	3.0
Key Accountability: Assist and advise undergraduate/graduate students	High Contributor	25.0%	4.0
Key Accountability: Provide administrative support for the department.	High Contributor	15.0%	4.0
Key Accountability: Coordinate meetings and events.	Needs Improvement	5.0%	2.0
Performance Goal: Help implement new system for tracking admissions	Fully Successful	15%	3.0
Performance Goal: Revise process documentation to incorporate new system	Exceptional	5%	5.0
Special Project: Provide admin support to departmental faculty search committee	Fully Successful	5%	3.0
Overall Assessment Rating:			3.45

1. First, the assessment rating is multiplied by the weighting factor to calculate the contribution of each element to the overall assessment rating:

Key Accountabilities:

Coordinate the graduate admissions process	$0.30 \times 3.0 = 0.90$
Assist and advise undergraduate/graduate students	$0.25 \times 4.0 = 1.00$
Provide administrative support for the department	$0.15 \times 4.0 = 0.60$
Coordinate meetings and events	$0.05 \times 2.0 = 0.10$

Performance Goals:

Help implement the new system for tracking admissions	$0.15 \times 3.0 = 0.45$
Revise process documentation to incorporate the new system	$0.05 \times 5.0 = 0.25$

Special Project Goal:

Provide admin support to department faculty search committee	$0.05 \times 3.0 = 0.15$
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2. Then an overall weighted average is calculated by adding together each of the individual results:

$$0.90 + 1.00 + 0.60 + 0.10 + 0.45 + 0.25 + 0.15 = \mathbf{3.45 \text{ Overall Assessment Rating}}$$

In Summary...

The following chart provides a quick overview of what you should know about priority weighting factors for performance elements within the GPS process:

Assigning Weighting Factors Summary	
Purpose:	<ul style="list-style-type: none"> ◆ To establish relative priorities as part of overall performance expectations
Use in GPS:	<ul style="list-style-type: none"> ◆ Overall assessment is calculated using weightings and ratings of elements ◆ A meaningful discussion point between supervisor and staff member
What gets weighted:	<ul style="list-style-type: none"> ◆ Key accountabilities ◆ Performance goals ◆ Special projects/assignments <p style="text-align: right;">} combined weightings must equal 100%</p>
Weighting based on:	<ul style="list-style-type: none"> ◆ Relative importance to the position and department ◆ Contribution to college/stem and/or University ◆ Impact of expected outcomes (i.e., bigger impact = larger weight) ◆ Not necessarily the amount of time spent
Frequency:	<ul style="list-style-type: none"> ◆ Establish at start of performance cycle ◆ Priorities change – confirm or adjust periodically ◆ Final review – confirm or adjust for annual appraisal