



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? The key accountabilities, with or without associated performance goals, should be assigned a priority weight as well as any special projects of significant impact. Weighting factors should be reviewed periodically and may be adjusted as departmental priorities change during the performance cycle.

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	
Purpose:	◆ To establish relative priorities as part of overall performance expectations
Use in GPS:	<ul style="list-style-type: none"> ◆ Introduced as an option element in the 2007 <i>GPS</i> process ◆ Mandatory for 2008 <i>GPS</i> appraisal process ◆ Provides an important discussion point between supervisor and staff member
What gets weighted:	<ul style="list-style-type: none"> ◆ Key accountabilities – weighting factors must total 100% ◆ Significant special projects – weighting factors must total 100%
Weighting based on:	<ul style="list-style-type: none"> ◆ Importance to the position, department, 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

Assigning Weighting Factors in the Online *GPS* Appraisal Tool

Only two sections of the online *GPS* appraisal form require priority weightings. For most staff members*, these are the key accountabilities and the special projects/assignments sections.

* Research personnel do not have key accountabilities. In the researchers' *GPS* appraisal form, priority weightings are required for the performance goals and special projects/assignments sections.

Within the key accountabilities (or researchers' performance goals) section, there are typically up to six accountabilities listed. Cumulatively, the weightings of the individual accountabilities (or researchers' performance goals) must equal 100%.

Likewise, if there are any goals listed in the special projects/assignments section, the cumulative weightings of individual projects must equal 100%. Only significant projects should be weighted.

Example 1: Weighting Assignments for Nancy Nash, Academic Coordinator

Elements: Key Accountabilities	Weight
◆ Coordinate the graduate admissions process	30%
◆ Assist and advise new and current undergraduate/graduate students	30%
◆ Provide administrative support for the department	25%
◆ Coordinate meetings and events	15%

Key Accountabilities Section Total: 100%

Elements: Special Projects/Assignments	Weight
◆ Serve on the departmental faculty search committee	100%
◆ Plan the departmental holiday party	0%

Special Projects/Assignments Section Total: 100%

In the summary section of the *GPS* appraisal form, the priority weightings and the performance ratings within the key accountabilities (or performance goals for research staff) and special projects/assignments sections are used to automatically calculate an overall performance rating.

Within the summary section, the section weights can be adjusted by the supervisor. The section weights determine the relative weighting of each section. The combined section weights must equal 100%.

An example of the summary section showing both ratings and weightings is shown at the top of the next page. The adjustable section weights appear above each section. Included in the example is an explanation of the calculation used to determine the overall performance rating.

Example 2: Appraisal Summary Section for Nancy Nash, Academic Coordinator

Overall Performance Rating Calculation

Fully Successful
Calculated Rating: 3.22 / 5.0

Section Weight: 95.0%			
2009 Key Accountabilities	Descriptor Rating	Weights	Numerical Rating
Coordinate the graduate admissions process.	Fully Successful	30.0%	3.0
Assist and advise undergraduate/graduate students.	Exceeds Some Expectations	30.0%	3.5
Provides administrative support for the department.	Meets Most Expectations	25.0%	2.5
Coordinates meetings and events.	High Contributor	15.0%	4.0
Section Weight: 5.0%			
2009 Special Projects/Assignments	Descriptor Rating	Weights	Numerical Rating
Serve on the departmental faculty search committee	High Contributor	100.0%	4.0
Plan the departmental holiday party	Not Rated	0%	0.0

1. First, a weighted average is calculated for each section by multiplying the item weight by the numerical rating:

Key Accountabilities:

$$(0.30 \times 3.0) + (0.30 \times 3.5) + (0.25 \times 2.5) + (0.15 \times 4.0) = 3.175 \quad \text{Section Average}$$

Special Projects:

$$(1.0 \times 4.0) = 4.0 \quad \text{Section Average}$$

2. Then an overall weighted average is calculated by multiplying each section average by the section weight:

$$(3.175 \times 0.95) + (4.0 \times 0.05) = \mathbf{3.21625} \quad \text{Overall Performance Rating}$$