

the organization | Human Resources

FY26 Performance Calibration Assessment

Enterprise and Department-Level Insights
July 2026

Performance Management Cycle

GOAL SETTING &
90 DAY REVIEW

Review: Set, align goals, and define SMART metrics



MID-YEAR
REVIEW

Track progress during Mid-year and mitigate obstacles

COMPENSATION PLANNING
CYCLE

Give recognition and reward performance

ANNUAL
REVIEW

Assess final results and complete Annual Review to determine performance rating

Executive Summary:

FY26 Performance Calibration Assessment

Overall Performance

- 94.4% of rated team members met or exceeded performance expectations.
- Nearly 1 in 2 team members (47.4%) were recognized for consistently performing above expectations.

Performance Differentiation

- Managers utilized all four rating categories, with Meets (47.0%) representing the largest rating group, indicating meaningful differentiation across performance levels.

Calibration Insights

- While the majority of team members across all Organizational Functions met or exceeded expectations, rating distributions varied across functions, reinforcing the value of continued enterprise calibration and consistent application of performance standards.

Looking Ahead

- Continue strengthening SMART goal setting, year-round goal tracking, manager coaching, and calibration practices to support objective, measurable, and consistent performance evaluations.

FY26 Performance Ratings at a Glance

Total Evaluated

—

Team Members

Total Rated

—

95.1% of population

Met or Exceeded

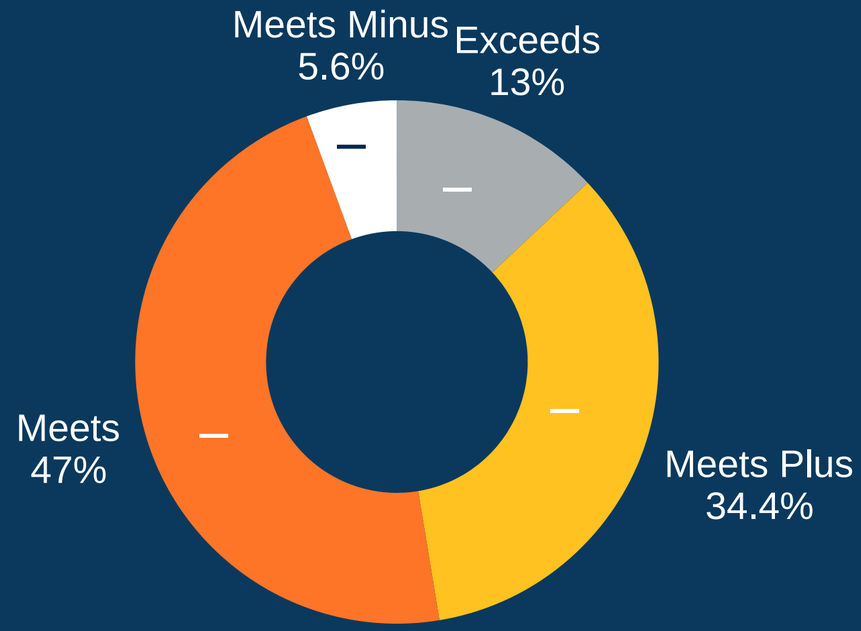
94.4%

— team members

Above Expectations

47.4%

— team members



Perform Yard: Performance Management- Manager Report

Key Takeaway

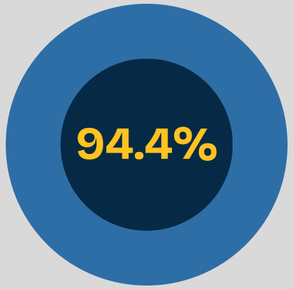
94.4% of rated team members met or exceeded expectations. Managers utilized all four rating categories, with the largest group at Meets (47%), demonstrating meaningful performance differentiation across the organization.

FY26 Performance Cycle Participation

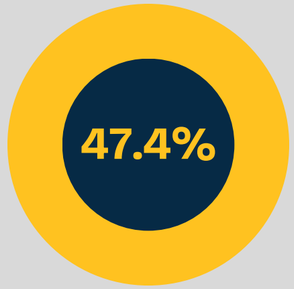
Summary of rated team member outcomes across the FY26 evaluation cycle

Total Evaluated	Total Rated	Met or Exceeded	Above Expectations
—	—	**94.4%**	**47.4%**
Team Members	95.1% of population	— team members	— team members

Metric	Count	Percentage
Performed Above Expectations (Exceeds + Meets Plus)	—	47.40%
Met or Exceeded Expectations (Exceeds + Meets Plus + Meets)	—	94.40%
Below Fully Meeting Expectations (Meets Minus)	—	5.60%
Not Evaluated (N/E)	—	**4.9% of total population**



Met or Exceeded Expectations



Above Expectations

What the data suggests

- Nearly all rated team members were assessed as successfully meeting or exceeding the expectations of their roles.
- Approximately four in ten rated team members were assessed as consistently performing beyond expectations.
- The largest concentration remained within Meets, indicating that the rating scale was not entirely concentrated in the two highest categories.
- 6.3% of rated team members received Meets Minus, demonstrating some use of the rating scale to identify performance requiring improvement.

Considerations for FY27

Core considerations aligned to FY27 performance-management priorities.

Core Consideration	FY27 Priority
SMART Goals Improve goal quality and measurable outcomes.	**SMART Goals** Strengthen SMART Goal Development to improve goal quality and measurable outcomes.
Year-Round Performance Reduce surprises and strengthen documentation through regular conversations and tracking.	**Year-Round Performance** Standardize goal progress tracking through regular manager check-ins and documented updates.
Manager Capability Build manager skill in goal setting, coaching, feedback, and differentiation.	**Manager Capability** Enhance manager capability with ongoing training on goal setting, coaching, feedback, and performance differentiation.
Calibration Consistency Reinforce fairness and consistent application of rating standards across Organizational Functions.	**Calibration Consistency** Continue enterprise calibration to reinforce consistency and fairness across Organizational Functions.
Talent Decisions Use performance data to support development, succession, and workforce planning.	**Talent Decisions** Leverage performance data to inform development planning, succession planning, and workforce strategy.

Leadership Takeaway

The FY27 priorities operationalize the FY26 considerations into a clear action agenda for stronger goal quality, manager capability, calibration consistency, and talent decisions.

FY — Recommendations

Strategic priorities to strengthen performance management in FY27

FY26 Performance Snapshot

Nearly half of rated team members recognized for sustained performance beyond expectations. Ratings demonstrate meaningful differentiation across Organizational Functions.

1 Strengthen Performance-Cycle Accountability

- Continue recurring completion reporting while establishing earlier escalation points for outstanding assessments and required manager actions.
- Strengthen SMART goal development to improve goal quality and measurable outcomes.
- Standardize year-round progress tracking through regular manager check-ins and documented updates.
- Enhance manager capability with ongoing training on goal setting, coaching, feedback, and performance differentiation.

2 Connect FY26 Insights to FY27 Goal Setting

- Use findings from the FY26 cycle to strengthen goal quality, measurable outcomes, organizational alignment, and manager accountability.
- Leverage performance data to inform development planning, succession planning, and workforce strategy.
- Continue enterprise calibration to reinforce consistency and fairness across Organizational Functions.

Leadership Takeaway

Strengthening SMART goal development, year-round progress tracking, and ongoing performance conversations will help ensure future performance evaluations are increasingly objective, measurable, and aligned with organizational priorities.

FY25 Year-End Performance Review Timeline

Manager Assessment Period

Executive Leadership Review Period

Year-End Performance Discussions Period

April — – May —

June 1 – June —

June — – July 8



April 6 – April —

Team Member Self Assessment Period

May —

Manager Assessment Period Ends
Preliminary Ratings Due
Promotion Recommendations Due

June —

Deadline for ratings changes in PerformYard

Aug —-Sep 4

FY26 Goal-Setting Period

PERFORMANCE RATINGS & GUIDANCE

PERFORMANCE RATINGS SCALE

	Rating	Description	Guidance
	Exceeds	Performance clearly exceeds in all areas. Consistently goes well beyond the scope of the position and attains exceptional results	Stands out as a major contributor and a highly valued Team Member. Work has signifcant impact across departments. Demonstrates strong collaboration with the ability to drive meaningful results. Cross-functional contributions enhance efficiency, improve teamwork and create lasting organizational benefits.
	Meets Plus	Performance is consistently beyond expectations.	This Team Member consistently delivers high quality results and takes initiative in their work. Collaborates effectively across functions within their department and demonstrates a proactive approach to problem-solving. Consistently shows a commitment to excellence.
	Meets	Performance met all major expectations.	Overall this Team Member successfully achieved their goals and exceeded expectations in some areas. Strong and reliable performer who consistently delivers solid results.
	Meets Minus	Performance sometimes meets expectations.	Sometimes attains acceptable results but did not meet all goals. Needs improvement in one or more areas.
	Below Plan	Performance did not meet expectations, but the Team Member performed according to plan in a few areas.	Performance lacks consistency and must improve in one or more areas.
	Too New To Rate	Includes any new hires who joined after October 1 of the performance year	New hires who joined after October 1 should not be provided with a year-end performance assessment but should instead engage in goal review discussions.

Ratings Scale Allows for Logical Performance Groupings

Rating	Description
Exceeds	Performance clearly exceeds in all areas.
Meets Plus	Performance is consistently beyond expectations.
Meets	Performance met all major expectations.
Meets Minus	Performance sometimes meets expectations.
Too New To Rate	Includes any new hires who joined after October 1

High Performers

Solid Performers

Low Performers

- **Not Eligible for Promotion**
- **Meets Minus: Eligible for merit/bonus**
- **Below Plan: Not Eligible for merit/bonus**

PERFORMANCE MANAGEMENT TRAINING & SESSION PARTICIPATION

Goal setting, mid-year, and year-end touchpoints across the FY26 cycle

4 Goal Setting Sessions	**6** Mid-Year Sessions	**6** Year-End Sessions	**—** Total Known Participation

Goal Setting Phase

4 sessions

Team Member Training
- Aug. — — FY26 Goal Setting Training Opt 1
- Aug. — — FY26 Goal Setting Training Opt 2

Working Sessions
- Aug. — — Goal Setting Working Session Opt 1
- Aug. — — Goal Setting Working Session Opt 2

Attendance: Data pending from recorded sessions

Mid-Year Phase

6 sessions

Team Member Training
- Oct. — — Mid-Year Training
- Oct. — — Mid-Year Training (2nd Offering)

Manager Training
- Oct. — — Mid-Year Manager Training
- Oct. — — Mid-Year Manager Training: KH

Working Sessions
- Nov. 4 — Team Member Working Session
- Nov. — — Manager Only Working Session

Attendance:
Team Members: — | Managers: —

Total: —

Year-End Phase

6 sessions

Team Member Training
- Apr. 8 — Year-End PerformYard Training
- Apr. 9 — Year-End Training (2nd Offering)

Manager Training
- Apr. 8 — Year-End Manager Training
- Apr. 9 — Year-End Manager Training (2nd)

Additional Audiences
- Apr. — — EXEC PerformYard Training

Working Sessions
- Apr. — — Year-End Team Member Assessment

Attendance:
Team Members: — | Mgrs/Exec: —
Office Hrs (Apr. 8-May —): —
Total: —

Key Insight: HR facilitated — participant interactions across Mid-Year and Year-End activities through training, working sessions, and individualized support. Goal Setting attendance is pending from recorded sessions.