

# Performance Management (PM) Interim Reviews

Presented by:

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# Performance Management Makeup:

- ❑ The are two main areas of the Performance Management Form:
  - **Section on Business Goals & Objectives (BG&Os):**
    - ✓ **Goals that are established between the employee and manager so that the employee's performance is aligned with the organization's strategic and business goals.**
    - ✓ **Goals should also align with the employees skills and interests.**
    - ✓ **The BG&Os should align with the employee's primary job responsibilities.**
    - ✓ **They should identify the employee's most critical responsibilities that will have an impact on the organization's success.**
    - ✓ **The goals should primarily focus on the outcomes (deliverables) rather than on the tasks themselves.**



# Performance Management Makeup:

## ➤ Section on Performance Values:

- ✓ These are what Boeing classifies as behaviors employees should have and demonstrate throughout the year.
- ✓ The scale used to evaluate the employee is: Did not meet expectations, Met some expectations, Met Expectations, Exceeded Expectations Far Exceeded Expectation.
- ✓ Typically Performance Values such as Good Corporate Citizenship, Shareholder Value, Integrity; employees are given “automatically a “Met Expectations””.
  - ❖ There is no clear definition from management on how to move up to “Exceeds Expectations”



## Performance Values and Behavioral Descriptors

**Employee and assigned manager discuss performance expectations for each of the Performance Values and what it means to meet expectations by reviewing the Behavioral Descriptors.**

Click on each Value title in **blue** for a detailed description

**Assigned Manager Action Required** 

<a href="#"><b>Problem Solving (Judgment)</b></a>	Interprets data from various sources; generates effective solutions to problems; makes sound business decisions; generates alternative approaches to problem solving; demonstrates awareness of consequences or implications of judgment.	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>
<a href="#"><b>Communication</b></a>	Listens and demonstrates understanding; clarifies meaning for others; speaks with clarity and precision; able to communicate with a diverse audience; writes clearly and concisely.	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>
<a href="#"><b>Technical Skills and Knowledge</b></a>	Applies knowledge, skills, and mastery of job processes to achieve results; expertise is recognized and sought by others; continuously develops and advances technical capabilities.	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>
<a href="#"><b>Integrity</b></a>	Deals with others in a fair, honest, and straightforward manner; honors commitments; is trustworthy; takes responsibility for failures and shares credit for successes; uses appropriate discretion and is sensitive to confidentiality; demonstrates high ethical standards.	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>
<a href="#"><b>Quality and Productivity</b></a>	Delivers products and services that consistently meet or exceed expectations with little or no rework required; uses metrics and tools to manage quality and identify root causes; strives for continuous quality improvements; uses time and resources effectively; produces value-added contributions; strives for more efficient work processes.	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>
<a href="#"><b>Customer Satisfaction</b></a>	Builds long-term relationships with customers; understands customers current and future needs; meets customer commitments and keeps customers informed; seeks and uses customer feedback.	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>
<a href="#"><b>People Working Together</b></a>	Effectively participates in accomplishing team goals; creates group cohesion; gives and seeks specific, constructive feedback; works effectively with other work groups; values the contributions of people from diverse backgrounds; involves others in decisions that affect them.	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>
<a href="#"><b>Good Corporate</b></a>	Takes responsibility for ensuring a healthy and safe work	<a href="#">DNM</a> <input type="radio"/>	<a href="#">MSE</a> <input type="radio"/>	<a href="#">MEE</a> <input type="radio"/>	<a href="#">EEX</a> <input type="radio"/>	<a href="#">FEE</a> <input type="radio"/>



# Interim Meeting:

- ❑ This meeting should take place around midyear (July timeframe).
- ❑ Purpose of this meeting is to see how things are going with the previously agreed upon projects/assignments. Discuss possible roadblocks that prevent you from completing your B&Os.
- ❑ If assignments have changed since your Define, this is when you want to revise your PE to reflect the changes.
- ❑ If milestones listed do not seem achievable, this is where you want to discuss and come to an agreement with your manager to recommit them.



# Interim Meeting:

- ❑ Review the Performance Values to see how the employee is doing and where improvements can be made.
- ❑ You can have interim reviews throughout the year to discuss your Define Plan.
  - Reviews can be Informal
  - Reviews can be Formal – scheduled meeting to document what is discussed.
- ❑ Interim Review is not a one time meeting; schedule as many as you see necessary throughout the year to help you solidify or modify your plan.



# Interim Meeting:

- Make sure to get specifics on areas to improve on for your BG&Os & PVs. **Document, Document Document!!!!**
  
- Have a discussion on the Competencies for your job classification:
  - Where do I need to improve for each of them?
    - ❖ These are the skills for your particular job classification
    - ❖ They are listed on your retention card
    - ❖ There are a total of 8 of them; two of them are the BG&Os & PVs
    - ❖ BG&Os & PVs makeup 40% of your overall retention score
    - ❖ You want to have an understanding as to the perception management has of you for each of the competencies.
    - ❖ Competencies play a key role when determining your overall retention rating.
  - **Document, Document, Document!!!!**
  
- Your PE is a living document that needs attention throughout the year!!

# Questions ???

