

UNDERSTANDING RETENTION RATINGS

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RETENTION RATINGS

Boeing managers assign retention ratings to employees each year. Should layoffs be necessary, the retention ratings determine the general order of layoff.

“Retention Group” is defined as:

Profs

- All employees within a single Major Organization with the same Skills Management Code (SMC).
- WHQ (Major Org)
 - Jobcode = 6J7B – 6D8
 - SMC = 6D8

Techs

- All employees within a single Major Organization with the same Skills Management Code (SMC) and the same level.
- WHQ (Major Org)
 - Jobcode = 6L9C – 61X
 - SMC = 61X
 - Level 3

RETENTION RATING DISTRIBUTION

R1 – 38% to 42%

R2 – 38% to 42%

R3 – 18% to 22%

Employees classified as Technical Fellows, Associate Technical Fellows and Technical Principal are not subject to these distribution requirements.

The general rule is that layoffs within Retention Groups begin with R3s, then R2s, then R1s. However, there are exceptions in the contracts that allow management to disregard retention ratings and layoff anyone.

RETENTION RATINGS

60% Competency Score

Example of Competencies:

- Certification & Qualification
- Electronic System Design
- Project Management
- Systems Thinking
- Adaptability
- Innovation
- Technical Currency

20% Priorities

20% Performance Values

SPEEA NOTIFICATION OF RETENTION RATING

Name:	6KBC14 (609)
Job Profile:	R3
Assigned Retention Rating:	R3
Retention Rating after Adjustment for Company Service:	3/31/2022
Created Date:	4/11/2022
Effective Date:	
Retention Status distribution within Job Profile after adjustment for company service:	R1: 11 R2: 4 R3: 1

Managers assess employees against a standard set of criteria that include past performance and competencies required to perform current and future work. Below is the criteria used to assess your skill group.

Assessment Criteria

- Summary Priority Rating
- Summary Performance Values Rating
- Analytical Skills (Technical)
- Communication
- Customer/Supplier Knowledge
- Engineering Processes
- Engr Knowledge/Comprehension
- Innovation / Creativity
- Systems Thinking
- Technical Currency

Primary Retention Leader _____

_____ Manager Signature

_____ Speea Retention Leader Signature



DROP IN RETENTION RATINGS

Managers give a variety of reasons for dropping retention ratings of individual employees:

Change in the Retention Group - If the size of a Retention Group changes (Layoffs, Retirement), the 40/40/20 split requirement must be redistributed among employees in the new group. This can affect some employees' retention ratings.

Upgrades or New Jobs - When employees receive upgrades or move into new jobs, they are ranked and rated with employees who have probably been doing that work for some time. Often employees who received upgrades or new jobs receive lower retention ratings as they adapt to the new job and get “up to speed” relative to their peers and their new expectations.

Change in Performance - Just as improvements in performance can, if they affect your relative value in the retention group, cause your retention rating to rise, periods of lower productivity can cause your rating to drop.



DROP IN RETENTION RATINGS

Changes in Assignments - Your work could change for any number of reasons. If the result is that you must learn new systems or new skills, the time this takes may affect your retention rating.

Designation - Employees who are rated R3 may also be “designated” by management. This means that in the event of a layoff, you would not be eligible for priority recall. Employees who are “designated” must receive an “Employee Improvement Action Plan” from their manager. This document is required to identify the specific conditions leading to the “designation,” and identify improvements which the manager deems necessary to avoid “designation” in the future. The manager is required to have on-going discussions with the employee about the employee’s progress under the Employee Improvement Action Plan

ADJUSTMENTS FOR COMPANY SERVICE

- ✓ Employees with 20 + years of Company service whose assigned retention rating is R3 will be given an adjusted retention rating of R2.
- ✓ Employees with 30 + years of Company service whose assigned retention rating is R2 will be given an adjusted retention rating of R1.
- ✓ Employees may elect to waive their service adjustment, which is good until the next retention index review.

RETENTION RATING APPEALS

8.4(H)

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- Employees have a right to “appeal” their assigned retention rating if they:

- a) Experienced a drop in retention rating
 - b) Received a fourth consecutive R3 rating
 - c) Received a designation
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- The outcome of the “Appeals” are determined by a majority vote among a three-person panel composed of one SPEEA representative (the employee’s Contract Administrator) and two Boeing representatives (a Human Resources Representative, and either a Salaried Workforce or Employee Relations Representative).

- To win the “appeal” , it has to be proven that “the process” was not followed. Usually, if the employee’s manager provided any credible reason for the employee’s retention rating or designation (such as those listed at the beginning of the presentation), the majority of the panel will deny the employee’s “appeal.”

RETENTION RATING APPEALS 8.4(H)

Appealing your drop in rating and/or designation:

- Must fill out and submit the SPEEA retention “appeal” request form and the requested documentation listed at the bottom of the form to your SPEEA Contract Administrator within 30 calendar days following notification of the assigned retention rating.
- https://www.speea.org/Member_Tools/Retention.html

Save the form to your desktop as a pdf. Fill out the saved form and email back to SPEEA. Include any relevant attachments.

SPEEA Retention Appeal Request

Employee Name: _____ Phone: _____
BEMSID: _____

Prof Tech (check one)

Job Classification/SMC/Level: _____

Last Hire: ____/____/____

Adjusted Service Date: ____/____/____

Written Retention Notification received on: ____/____/____

My problem is (the prerequisite for the appeal):

- Retention Drop? (From R _____ to R _____)
- Four consecutive R3s? Yes No (check one)
- Designation? Yes No (check one)

Supervisor's Name: _____

I spoke with my supervisor about my retention/designation on: ____/____/____

The reason my supervisor gave for my retention/designation was:

I would like SPEEA to appeal because:

I have attached copies of my:

- Written Retention Notification
- Last three Performance Evaluation Close-outs
- Current IPA notification
- Recent letters of commendation or awards

TIPS

★ Communicate with your manager: ★

- Competency Scores
 - What are my Competency categories?
 - What competencies do I need to improve on?
 - Retention Rating
 - Why did I drop?
 - How can I remain a R1 or R2?
 - How can I move up a rating?
- Performance Management
 - Understand your manager's expectations
 - Meet with your manager on a regular basis, not just at your Define, Interim and Closeout
- Prior to the Retention Rating Process
 - Type out a summary of your accomplishments, job duties, etc. to provide to your manager to help prepare them for the retention indexing exercises.






LAYOFF PROCESS & BENEFITS



ENGINEERING LAYOFF PROCESS

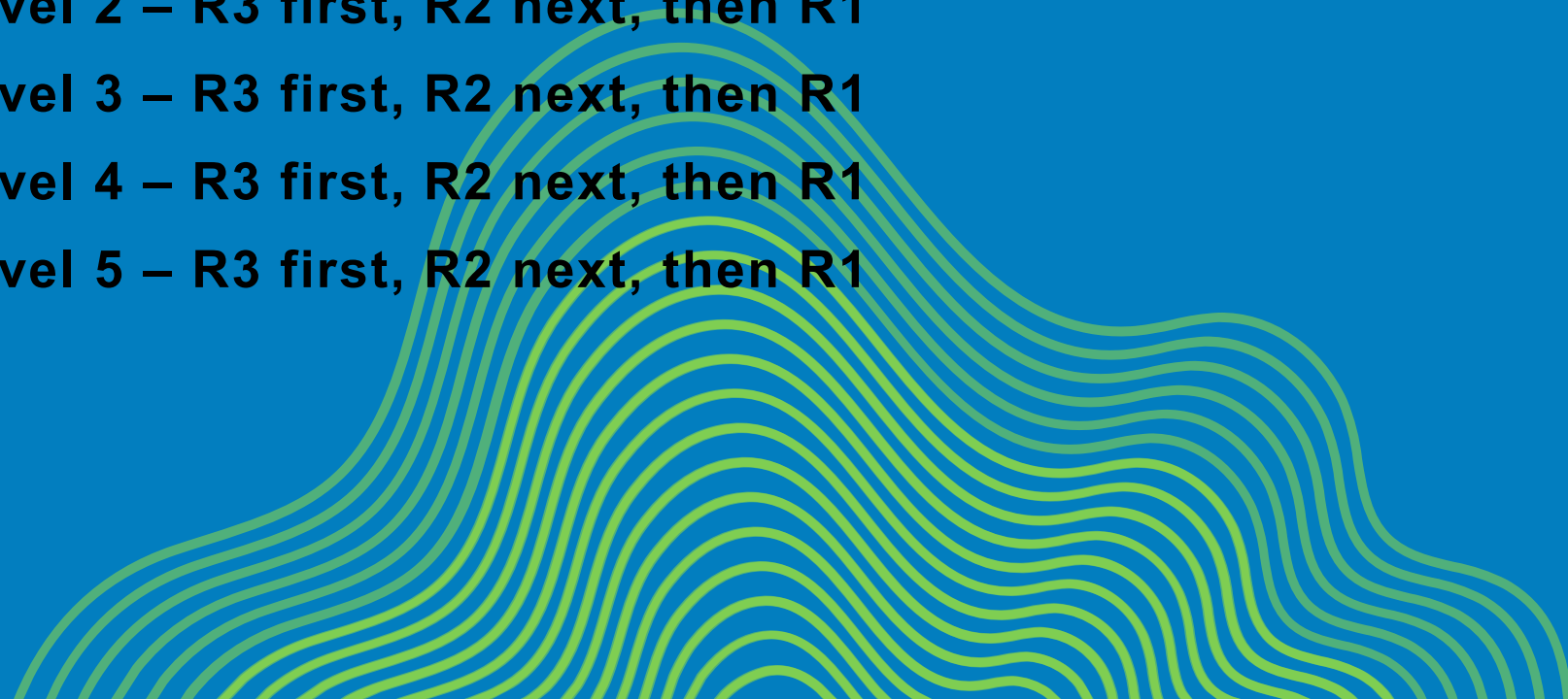
A Surplus is declared within one or more Job Family and SMC's in Major Org:

- 1. Layoff contractors in Org in JF/SMC**
 - 2. Layoff R3's in Org in JF/SMC**
 - 3. Layoff R2's in Org in JF/SMC**
 - 4. Transfer a sufficient number of R1's to other Org**
 - 5. Layoff everyone else**
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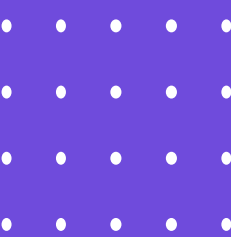


TECHNICAL LAYOFF PROCESS

Surplus is declared within one or more Job Family and SMC's in a Major Org:

- 1. Layoff contractors in Org in JF/SMC**
 - 2. Layoff Level 1 – R3 first, R2 next, then R1**
 - 3. Layoff Level 2 – R3 first, R2 next, then R1**
 - 4. Layoff Level 3 – R3 first, R2 next, then R1**
 - 5. Layoff Level 4 – R3 first, R2 next, then R1**
 - 6. Layoff Level 5 – R3 first, R2 next, then R1**
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LAYOFF BENEFITS



Involuntary (ILO)

- 1 week of pay for each full year of service, max 26 weeks
- Can be taken as income continuation or Lump Sum
- If Lump Sum is selected, Priority Recall Rights are waived
- 3 months of medical/dental coverage

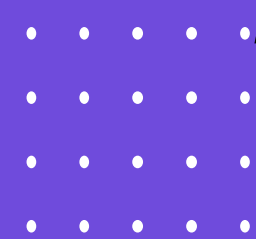
Voluntary (VLO)

- 1 week of pay for each full year of service, max 26 weeks
- Payment is made in a single lump sum
- No Priority Recall Rights
- 3 months of medical/dental coverage

LOU 28 – Work Movement Enhanced Layoff Benefit

- 2 weeks of pay for each year of full service
- Minimum 26 weeks and a maximum 60 weeks
- Lump Sum
- No Priority Recall Rights
- 6 months of medical/dental coverage

“Layoff Benefits are not severance” They do not reduce Washington State
Unemployment benefits





QUESTIONS

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