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”
<table>
<thead>
<tr>
<th>Performance Values and Behavioral Descriptors</th>
<th>Assigned Manager Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Click on each Value title in blue for a detailed description</strong></td>
<td></td>
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<tr>
<td>Problem Solving (Judgment)</td>
<td>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.</td>
</tr>
<tr>
<td>Communication</td>
<td>Listens and demonstrates understanding; clarifies meaning for others; speaks with clarity and precision; able to communicate with a diverse audience; writes clearly and concisely.</td>
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<tr>
<td>Technical Skills and Knowledge</td>
<td>Applies knowledge, skills, and mastery of job processes to achieve results; expertise is recognized and sought by others; continuously develops and advances technical capabilities.</td>
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<tr>
<td>Integrity</td>
<td>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.</td>
</tr>
<tr>
<td>Quality and Productivity</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>Builds long-term relationships with customers; understands customers current and future needs; meets customer commitments and keeps customers informed; seeks and uses customer feedback.</td>
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<tr>
<td>People Working Together</td>
<td>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.</td>
</tr>
<tr>
<td>Good Corporate</td>
<td>Takes responsibility for ensuring a healthy and safe work environment.</td>
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</tbody>
</table>
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 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.

- Your PE is a living document that needs attention throughout the year!!
Questions ???