



Agenda/Report

Performance appraisal, assessment and development interview

General data	
Employee's name:	
Date start employment:	
Date termination employment:	
Position (according to job description):	
Name line manager:	
Date previous meeting:	
Date present meeting:	
Period covered by this interview: until
Name persons consulted for feedback (optional):	

Introduction

Having a yearly performance appraisal interview gives the opportunity to managers AND employees to discuss the present job requirements, employments for the near future, the mutual collaboration and developmental ambitions at a certain distance from the daily working environment.

This form serves as an agenda with suggestions for the preparation as well as the meeting itself and is to be used for its reporting. It contains the following items:

- retrospection (assessment part);
- outlook (e.g. a year);
- mutual collaboration;
- development agreements;
- future prospects (more than one year ahead);
- blank space (for other comments).

You will find a preparation checklist for having a performance interview on the NWO-I website.

Retrospection

Aim of this retrospection (assessment part) is to evaluate the activities in the past period, what results have been achieved, is the employee particularly proud of something and the discussion of the line manager's opinion on the job performance. We advise line managers to include feedback from the immediate work environment of the employee (colleague/external contact) in order to increase their opinion's objectivity.

1. Name the fulfilment of the agreements from the previous performance and development interview or the agreements made on entering employment. What is your opinion on the results (agreement, fulfilment and opinion)?

2. Describe the other activities that have been performed during the review period (without taking the agreements mentioned in question 1 into consideration). What is your opinion on these job performances?

3. What is your (overall) opinion on the quantity and quality of the performances?

4. What is your opinion on the most important knowledge, skills and qualities required for the job¹?

5. What is your opinion on the commitment/job attitude of the employee?

6. Have there been circumstances that may have influenced the employee's commitment or performance in a positive or negative way? Also, take into consideration domestic situation, taking leave agreements and absenteeism. Please note them here.

¹ [You will find a checklist on the NWO-I website \(on having performance and development interviews\) with examples of knowledge, skills and qualities for each job category.](#)

7. Mention the obtained feedback from the work environment (optional). Is this feedback in full agreement with you own opinion? If not, what are the differences?

8. How do you evaluate the collaboration with the line manager and colleagues? Name the agreements you have made together with the employee concerning managing/counselling, collaboration and reporting.

9. What are the employee's thoughts on the atmosphere within the organisation?

Outlook

Tasks, result agreements and points for development determined by the line manager

for the coming period, taking into account the previous retrospection and possible specific circumstances. As well as the discussion of the work relation.

Formulate SMART, see the [preparation checklist](#).

10. Specify the work to be carried out/the results for the coming period and the contribution expected from the employee.

11. Is the present job description fitting for the work to be carried out or is a change required?

12. Are there circumstances to be anticipated that may influence the performance? (Also, think of work relation, age phase, health, domestic situation, work for third parties and leave entitlement.)

13. Is the employee in need of support to achieve the result? (Consider occupational safety and health, coaching, training² and means.)

² NWO-I postdocs may participate in the NWO-I range of training programmes for PhD students. [For more information consult the NWO-I website](#).

14. What arrangements have you made with the employee concerning the further development of knowledge and skills?

Future prospective

The discussion of the 'potential' opinion of the line manager and the employee's ambitions. A separate Professional Development Plan (Nederlands: POP) may be set up should it prove desirable to record agreements dealing with the longer term, such as training, education or a specific task performance, more elaborately.

15. What are the employee's wishes and ambitions for the future (for the coming years as well as the longer term)?

16. What are/is the growing possibilities/potential for the employee in your opinion? In what way does your assessment relate to the ambitions (question 14)?

17. What kind of associated (developmental) possibilities can you/NWO-I offer the employee?

Blank space for an overall reflection by the line manager:

Blank space for a reaction by the employee:

The next interview will take place on:

Signing

The undersigned agree with the reporting and stated agreements.

The employee takes note of the retrospection (assessment part), but does not have to agree with it. The employee can indicate this in the black space above.

Line manager Date:	Employee Date:
Signature	Signature

Next senior line manager

- I have taken note of this reporting and agree with its stated agreements.
- I have examined the opinion of the line manager against my own perception of the employee, his/her performance and the context.

Next senior line manager: Name: Date: Signature

PLEASE SEND THE SIGNED ORIGINAL REPORT

**For employees working in NWO-I-workgroups at universities send it to:
NWO-I, t.a.v. P&O, Postbus 3021, 3502 GA Utrecht.**

For employees working at NWO-I Institutes or at the NWO-I-office send it to your local P&O advisor.