

Documentation sheet: Appraisal interview

Part 1 – Review of the past year

Manager/Supervisor:

Staff member:

Date:

Tasks/goals of last appraisal interview	Achieved yes/no	Comments

Cooperation between manager/supervisor and staff member

(Mutual Feedback: Manager/supervisor to staff member and vice versa)

What works well?

(e.g. regular reports)

What doesn't work so well?

(e.g. irregular transfer of information)

Working environment and job satisfaction

What is good?

(e.g. good working atmosphere)

What is less good?

(e.g. lack of resources)

Agreement for the upcoming year – cooperation:

Rules for cooperation:

(e.g. face-to-face exchange every two weeks)

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Part 2 – Preview of the coming year

Goals/tasks¹ for the upcoming year (what?) Criteria of success for obtaining goals and reflecting on resources²	Subgoals / subtasks for achievement (How?)	Time frame (By when?)

¹ Conservation goals for consistent performance/ tasks vs design goals for new goals/ tasks/ projects

² How can I tell the goal has been reached/the task has been completed? What resources do I need?

Measures for development for the upcoming year³:

Vacation planning for the upcoming year⁴:

Comments

Date

Signature of staff member

Signature of manager/supervisor

Note: The documentation sheet remains with the interview partners. The date of the AI is to be entered in the BOKU training passport.

³ Such as trainings in the BOKU training passport

⁴ When planning the working year, rest periods and vacation should always be discussed too. The final vacation agreement is settled using the vacation form (“Urlaubsformular”).