The **annual review**

Manual for managers

New style **annual review**
time for your development

The annual review: everything a manager needs to know

Preparation for the annual review as a manager/ group leader

Starting in 2025, we will be introducing a new annual review that better reflects the values of a development-oriented and motivating work culture that the Academy wishes to promote. In addition to results and work agreements, the core values of Appreciative Leadership, *development*, *connection,* and *clarity* will also be central to this review. The annual review will also be more closely aligned with other themes that we support within the Academy, such as Diversity, Inclusion & Social Safety, and Recognition & Rewards.

Purpose of the annual review

During the annual review, you and your employee look back on the goals and agreements that were formulated last year, their (team) results, their development, and their well-being over the past year. Goals and agreements are formulated for the coming year to make sure the employee can perform well and enjoy work. Attention is paid to development within the position they are in, connection and collaboration with colleagues and clarity about the work agreements and tasks if necessary.

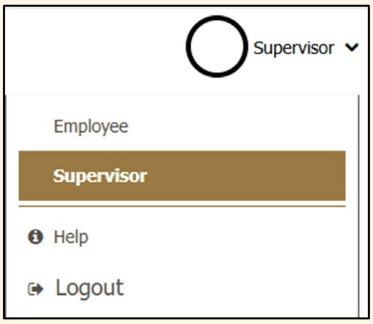
In this document, we explain how to complete the annual review form in Workforce and all the steps involved. We wish you a pleasant review!

Steps in the annual review

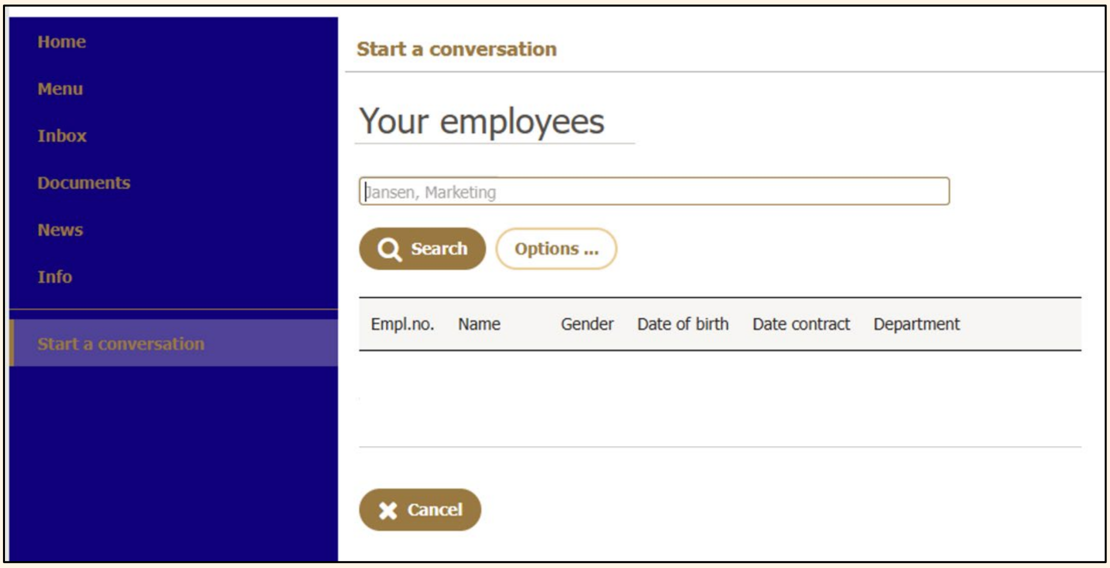
1. Invitation

Scheduling the annual review is the responsibility of the manager. In the first year, you, as a manager/ group leader, initiate this yourself. In subsequent years, you will receive a reminder by email from Workforce to schedule the next annual review.

- Give each other sufficient time to prepare and schedule the meeting at least four weeks in advance.
- Make sure you click on your manager role in the top right corner of your Workforce profile before sending the invitation.



- Go to **'Menu'** and click on the **'Annual review'** tile.
- All employees you manage are listed here and you can invite them individually for a meeting. The employee will receive an email about this. Is the employee not listed in your team or do you not have a managerial profile? Then you are not (yet) registered in Workforce as the manager of this employee. Consult with the HR advisor of your institute to find out how to resolve this.



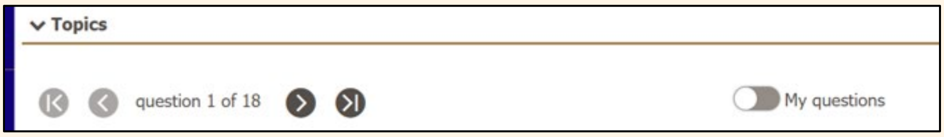
Preparing for the meeting

The annual review form

- Before the interview, take some time to reflect on your employee's performance and development over the past year.
- The annual review form, which you will each fill in in advance, consists of six sections:
    1. **Details:** the employee's basic details.
    2. **Review:** a reflection by the employee and by you on the past year.
    3. **Development:** discuss together how the employee wants to develop in the coming year, what your vision is and what the possibilities are.
    4. **Connection:** together, choose a few topics that are relevant to the employee within the themes of work situation and cooperation so that you can discuss them together. The employee will then provide feedback on how they experience the cooperation with you.
    5. **Clarity:** discuss the work agreements, the employee's additional tasks, excess of outstanding vacation days and any other matters you wish to discuss.
    6. **Development goals and agreements for next year:** make agreements together based on this conversation and formulate the development goals and agreements for the coming year.

Step-by-step plan for the annual review form

- The employee prepares for the meeting by completing the annual review form in advance and sharing it with you in Workforce, at least one week before the meeting.
- Review the employee's responses in the annual review form and navigate to the previous/next question by clicking on the arrows at the top left of the question.



- At the top right, you will see a button called: '**My questions**'. You can choose to display only the questions that you can answer yourself or all questions (including those of your employee).
- Read the employee's completed annual review form carefully and add your perspective: what is your view on the realisation of the work agreements over the past year and the personal and professional development of the employee? If necessary, also gather input from other sources, for example if the employee is also supervised by others.
- For each topic in the annual review form, you will find several suggested questions that you can use to prepare for the review. The intention is not to go through all these questions one by one or to answer them all. This is not a tick the box exercise. The suggested questions are merely a tool to help you think about the most important points that you and the employee want to discuss about the past period and the

coming year. If you notice your employee is filling in all the questions, explain that this is not needed and together decide on the most important things to discuss.

- Formulate your feedback about the employee and include it in the annual review form. Do not send this to the employee yet, discuss it during the conversation first.
  - Not all fields need to be filled in beforehand. The questions under the heading of Connection, for example, can also be discussed on the spot. However, do think in advance about any topics you would like to discuss and note down what you have agreed on during the conversation.
  - Before the meeting, look up the employee's ancillary activities and the number of days of leave they have not taken up yet. Discuss this during the meeting if necessary.
  - If you would like to print out the form in advance, you can do so by clicking on **'Merge'** under the heading **'Draft document'** and downloading the document.

The feedback form

- The employee asks two colleagues with whom they have worked closely over the past year for feedback on their collaboration.
- The employee can choose to share the feedback with you. The purpose of this feedback is to enable the employee to learn from it. If the employee shares this feedback with you, you can find it in the relevant personnel file in Workforce under the **'Development'** tile. Even if the employee does not share the feedback with you (that is up to them), they will still reflect on it and discuss with you what they can take from it for their development in the coming year.

Additional tips for preparation

Consider the following questions:

- What went well in the past period? What went less well?
- How can the employee develop further, both personally and as part of a team?
- What are their qualities and specific talents?
- How did the employee contribute to the (project) team, department or research group?
- How did the employee work with others?
- Check whether your employee(s) are aware of the goals of your (project) team, department or research group.
- The KNAW uses this vision of appreciative leadership. You can find it **here**. Think about how the employee can use the values of appreciative leadership (development, connection and clarity) for their personal development.

3. The meeting

You and your employee have a conversation about the past period and expectations for the coming year. The form for the annual review serves as a guideline for this. To have a good conversation, it is important to be able to talk without distractions. Only use the laptop if you have no other option. You can print out the form or use the laptop if something needs to be filled in, but limit the use of the computer during the conversation as much as possible.

The review: look back on the past period together

- You and your employee discuss the answers to the questions in the annual review form.
- When looking back on the results achieved, it is important to focus the attention on the most important tasks and responsibilities of the employee. For example, if the employee mainly does research, the focus during the review should be on this work activity.
- During the meeting, reflect on the past year and any feedback received from others via the feedback form (the employee does not need to share the feedback form itself with you).
- Provide feedback on the employee's performance and development and discuss this thoroughly with each other.

Development, connection and clarity: look ahead together to the coming period

- Discuss the new development goals, the work situation, cooperation with others, and ask the employee to provide feedback to you as their manager.
- Be aware that giving feedback to a manager can be stressful, so give the employee plenty of space to formulate and express their feedback without becoming defensive or responding immediately with an explanation. Do ask additional questions if you do not understand the feedback.
- Consider the employee's work-life balance and well-being, as well as any challenges that may arise in the workplace. Check whether the work agreements are clear and still adequate.
- If applicable, discuss additional tasks and outstanding leave.

Additional tips during the conversation

As a manager, you play an important role in creating a safe and open conversation. Here are a few tips:

- Make sure you choose a location where you can talk undisturbed and allow 1 to 1.5 hours for the conversation.
- If a laptop is used, make sure it is not between you and your employee and that you can both see the screen.
- Give your employee space to talk, explain things and ask questions. The employee is the focus of the conversation.
- Emphasise that you are open to feedback and summarise what has been said to check that you have understood correctly.
- Would you like to learn more about conducting open conversations, giving feedback or connective leadership? At Portus, you can find more information about what CLO has to offer to help you further.

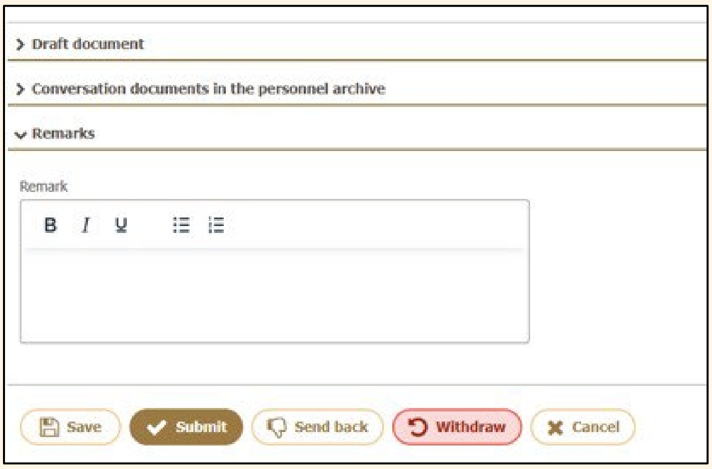
Agreements

- Make agreements about the results to be achieved in the year ahead, the (team) contribution and desired development, and what is needed to achieve this.

Have you covered everything you and your employee wanted to discuss? Check this together.

4. Follow-up

- After the meeting, fill in the annual review form with what was discussed and agreed during the meeting and share it with the employee for approval.
- Would you like to save the form in the meantime? Click on : “**Save temporarily**”. You will find the form in the Workforce Inbox, where you can continue working on it later. The temporary version will not be shared with the employee.
- Do you want to give the employee a chance to edit the form after the interview? Then click **"Send back"** and ask the employee to resubmit the form via the "**Submit**" button after the adjustments have been made.



- Click **"Submit"** and prepare the document for signature.
- Creating the final document is the last step before officially signing the annual review report. Do this only once the document is complete and you agree on a final version.
- To create the final annual report in PDF, click **"Merge"**. Then click **"Submit"**. Note: Before this step can be completed, the annual review file must be attached as a PDF.
- After a digital signature by both the employee, the form is saved in ADP Workforce's digital file.
- The employee signs **“Accept”** if they agree with the summary of the conversation. If there are any points that the employee feels do not accurately reflect the conversation, you can make adjustments together. If you really cannot agree, the employee can sign **“Sign for seen”** instead of **“Accept”**. Contact the HR adviser to inform them when this happens and to discuss next steps together.
- You and your employee agree on when you will meet again for an interim meeting or to follow up on topics discussed here. Discuss these topics this regularly throughout the year.