

Sample Performance Evaluation Forms

Contributed by AIA Knowledge Resources Staff

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SUMMARY

Employee performance should be evaluated periodically, regularly, and objectively. The attached sample evaluation forms, while not comprehensive, offer guidance for evaluating performance competencies for three categories of employees in architecture firms: administrative, professional/technical, and management. Adapt the forms to suit the evaluation needs of your own firm.

RATING METHODS

Performance evaluations may be scored in a number of ways. Two of the most common are numerical ratings and a graphic scale. The attached sample evaluation forms use the numerical rating system.

The scores of a numerical rating system typically have the following values:

- 1 Unsatisfactory
- 2 Needs improvement
- 3 Meets job requirements
- 4 Exceeds job requirements
- 5 Outstanding

RESOURCES

More Best Practices

The following AIA Best Practices provide additional information related to this topic:

- 07.01.03 A Sample Compressed Workweek Program
- 07.02.02 Basic Elements of New Employee Orientation
- 07.04.02 Employment Status: Independent Contractor -- Yes or No?

For More Information

See also "Managing People," by Kathleen C. Maurel, Assoc. AIA, and Laurie Dreyer-Hadley, *The Architect's Handbook of Professional Practice*, 13th edition, Chapter 9, page 221.

See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



Feedback

The AIA welcomes member feedback on Best Practice articles. To provide feedback on this article, please contact bestpractices@aia.org.

Key Terms

- Practice
- Personnel management
- Employment

**SAMPLE PERFORMANCE EVALUATION FORM
ADMINISTRATIVE PERSONNEL**

Employee name: _____

Employment start date: _____

Job title: _____

Department: _____

Review period start: _____

Review period end: _____

Last review date: _____

Reviewer name: _____

Reviewer title: _____

PERFORMANCE COMPETENCIES

COMMUNICATIONS	1	2	3	4	5
Expresses ideas and thoughts verbally.....	1	2	3	4	5
Expresses ideas and thoughts in written form	1	2	3	4	5
Exhibits good listening and comprehension.....	1	2	3	4	5
Keeps others adequately informed	1	2	3	4	5
Uses appropriate communication methods.....	1	2	3	4	5
COOPERATION	1	2	3	4	5
Establishes and maintains effective relations	1	2	3	4	5
Exhibits tact and consideration	1	2	3	4	5
Displays positive outlook and pleasant manner	1	2	3	4	5
Offers assistance and support to coworkers	1	2	3	4	5
Works cooperatively in group situations.....	1	2	3	4	5
Works actively to resolve conflicts	1	2	3	4	5

DEPENDABILITY	1	2	3	4	5
Responds to requests for service and assistance.....	1	2	3	4	5
Follows instructions, responds to management direction.....	1	2	3	4	5
Takes responsibility for own actions	1	2	3	4	5
Commits to doing best job possible	1	2	3	4	5
Keeps commitments	1	2	3	4	5
Meets attendance and punctuality guidelines	1	2	3	4	5
INITIATIVE	1	2	3	4	5
Volunteers readily	1	2	3	4	5
Undertakes self-development activities.....	1	2	3	4	5
Seeks increased responsibilities	1	2	3	4	5
Takes independent actions and calculated risks.....	1	2	3	4	5
Looks for and takes advantage of opportunities	1	2	3	4	5
Asks for help when needed.....	1	2	3	4	5
JOB KNOWLEDGE	1	2	3	4	5
Competent in required job skills and knowledge.....	1	2	3	4	5
Exhibits ability to learn and apply new skills	1	2	3	4	5
Keeps abreast of current developments	1	2	3	4	5
Requires minimal supervision	1	2	3	4	5
Displays understanding of how job relates to others.....	1	2	3	4	5
Uses resources effectively	1	2	3	4	5
JUDGMENT	1	2	3	4	5
Displays willingness to make decisions	1	2	3	4	5
Exhibits sound and accurate judgment	1	2	3	4	5
Supports and explains reasoning for decisions.....	1	2	3	4	5
Includes appropriate people in decision-making process.....	1	2	3	4	5
Makes timely decisions	1	2	3	4	5
PLANNING & ORGANIZATION	1	2	3	4	5
Prioritizes and plans work activities	1	2	3	4	5
Uses time efficiently	1	2	3	4	5
Plans for additional resources.....	1	2	3	4	5
Integrates changes smoothly	1	2	3	4	5

Sets goals and objectives	1	2	3	4	5
Works in an organized manner	1	2	3	4	5
PROBLEM SOLVING	1	2	3	4	5
Identifies problems in a timely manner.....	1	2	3	4	5
Gathers and analyzes information skillfully	1	2	3	4	5
Develops alternative solutions	1	2	3	4	5
Resolves problems in early stages	1	2	3	4	5
Works well in group problem-solving situations	1	2	3	4	5
QUALITY	1	2	3	4	5
Demonstrates accuracy and thoroughness.....	1	2	3	4	5
Displays commitment to excellence	1	2	3	4	5
Looks for ways to improve and promote quality	1	2	3	4	5
Applies feedback to improve performance.....	1	2	3	4	5
Monitors own work to ensure quality.....	1	2	3	4	5
QUANTITY	1	2	3	4	5
Meets productivity standards	1	2	3	4	5
Completes work in timely manner	1	2	3	4	5
Strives to increase productivity	1	2	3	4	5
Works quickly.....	1	2	3	4	5
Achieves established goals.....	1	2	3	4	5
USE OF TECHNOLOGY	1	2	3	4	5
Demonstrates required skills.....	1	2	3	4	5
Adapts to new technologies	1	2	3	4	5
Troubleshoots problems	1	2	3	4	5
Uses technology to increase productivity.....	1	2	3	4	5
Keeps technical skills up to date.....	1	2	3	4	5

DEVELOPMENT PLANS

FUTURE GOALS

EMPLOYEE COMMENTS

EMPLOYEE ACKNOWLEDGMENT

I have reviewed this document and discussed the contents with my supervisor. I acknowledge that I have been advised of my performance status, which does not necessarily imply that I agree with the evaluation.

Employee signature/Date

REVIEWER COMMENTS

Reviewer signature/Date

**SAMPLE PERFORMANCE EVALUATION FORM
PROFESSIONAL/TECHNICAL PERSONNEL**

Employee name: _____

Employment start date: _____

Job title: _____

Department: _____

Review period start: _____

Review period end: _____

Last review date: _____

Reviewer name: _____

Reviewer title: _____

PERFORMANCE COMPETENCIES

ANALYTICAL SKILLS	1	2	3	4	5
Synthesizes complex or diverse information.....	1	2	3	4	5
Collects and researches data	1	2	3	4	5
Uses intuition and experience to complement data	1	2	3	4	5
Identifies data relationships and dependencies	1	2	3	4	5
Designs workflows and procedures	1	2	3	4	5
INITIATIVE	1	2	3	4	5
Volunteers readily	1	2	3	4	5
Undertakes self-development activities.....	1	2	3	4	5
Seeks increased responsibilities	1	2	3	4	5
Takes independent actions and calculated risks.....	1	2	3	4	5
Looks for and takes advantage of opportunities	1	2	3	4	5
Asks for help when needed.....	1	2	3	4	5
INNOVATION	1	2	3	4	5
Displays original thinking and creativity	1	2	3	4	5
Meets challenges with resourcefulness	1	2	3	4	5

Generates suggestions for improving work.....	1	2	3	4	5
Develops innovative approaches and ideas.....	1	2	3	4	5
JOB KNOWLEDGE	1	2	3	4	5
Competent in required job skills and knowledge.....	1	2	3	4	5
Exhibits ability to learn and apply new skills	1	2	3	4	5
Keeps abreast of current developments	1	2	3	4	5
Requires minimal supervision	1	2	3	4	5
Displays understanding of how job relates to others.....	1	2	3	4	5
Uses resources effectively	1	2	3	4	5
JUDGMENT	1	2	3	4	5
Displays willingness to make decisions	1	2	3	4	5
Exhibits sound and accurate judgment	1	2	3	4	5
Supports and explains reasoning for decisions.....	1	2	3	4	5
Includes appropriate people in decision-making process.....	1	2	3	4	5
Makes timely decisions	1	2	3	4	5
ORAL COMMUNICATIONS	1	2	3	4	5
Speaks clearly and persuasively.....	1	2	3	4	5
Listens and gets clarification.....	1	2	3	4	5
Responds well to questions	1	2	3	4	5
Demonstrates group presentation skills	1	2	3	4	5
Participates in meetings.....	1	2	3	4	5
PLANNING & ORGANIZATION	1	2	3	4	5
Prioritizes and plans work activities	1	2	3	4	5
Uses time efficiently	1	2	3	4	5
Plans for additional resources.....	1	2	3	4	5
Integrates changes smoothly	1	2	3	4	5
Sets goals and objectives	1	2	3	4	5
Works in an organized manner	1	2	3	4	5
PROBLEM SOLVING	1	2	3	4	5
Identifies problems in a timely manner.....	1	2	3	4	5
Gathers and analyzes information skillfully	1	2	3	4	5
Develops alternative solutions	1	2	3	4	5

Resolves problems in early stages	1	2	3	4	5
Works well in group problem-solving situations	1	2	3	4	5
QUALITY	1	2	3	4	5
Demonstrates accuracy and thoroughness.....	1	2	3	4	5
Displays commitment to excellence	1	2	3	4	5
Looks for ways to improve and promote quality.....	1	2	3	4	5
Applies feedback to improve performance.....	1	2	3	4	5
Monitors own work to ensure quality.....	1	2	3	4	5
TEAMWORK.....	1	2	3	4	5
Balances team and individual responsibilities.....	1	2	3	4	5
Exhibits objectivity and openness to others' views	1	2	3	4	5
Gives and welcomes feedback	1	2	3	4	5
Contributes to building a positive team spirit.....	1	2	3	4	5
Puts success of team above own interests	1	2	3	4	5
USE OF TECHNOLOGY	1	2	3	4	5
Demonstrates required skills.....	1	2	3	4	5
Adapts to new technologies	1	2	3	4	5
Troubleshoots technological problems.....	1	2	3	4	5
Uses technology to increase productivity.....	1	2	3	4	5
Keeps technical skills up to date	1	2	3	4	5
WRITTEN COMMUNICATIONS	1	2	3	4	5
Writes clearly and informatively	1	2	3	4	5
Edits work for spelling and grammar.....	1	2	3	4	5
Varies writing style to meet needs	1	2	3	4	5
Presents numerical data effectively	1	2	3	4	5

DEVELOPMENT PLANS

FUTURE GOALS

EMPLOYEE COMMENTS

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Employee signature/Date

REVIEWER COMMENTS

Reviewer signature/Date

**SAMPLE PERFORMANCE EVALUATION FORM
MANAGEMENT PERSONNEL**

Employee name: _____

Employment start date: _____

Job title: _____

Department: _____

Review period start: _____

Review period end: _____

Last review date: _____

Reviewer name: _____

Reviewer title: _____

PERFORMANCE COMPETENCIES

COMMUNICATIONS	1	2	3	4	5
Expresses ideas and thoughts verbally.....	1	2	3	4	5
Expresses ideas and thoughts in written form	1	2	3	4	5
Exhibits good listening and comprehension.....	1	2	3	4	5
Keeps others adequately informed	1	2	3	4	5
Uses appropriate communication methods.....	1	2	3	4	5
COST CONSCIOUSNESS	1	2	3	4	5
Works within approved budget.....	1	2	3	4	5
Conserves organizational resources.....	1	2	3	4	5
Develops and implements cost-saving measures.....	1	2	3	4	5
Contributes to profits and revenue	1	2	3	4	5
DELEGATION	1	2	3	4	5
Delegates work assignments	1	2	3	4	5
Matches the responsibility to the person.....	1	2	3	4	5
Gives authority to work independently	1	2	3	4	5
Sets expectations and monitors delegated activities	1	2	3	4	5
Provides recognition for results.....	1	2	3	4	5

JOB KNOWLEDGE	1	2	3	4	5
Competent in required job skills and knowledge	1	2	3	4	5
Exhibits ability to learn and apply new skills	1	2	3	4	5
Keeps abreast of current developments	1	2	3	4	5
Requires minimal supervision	1	2	3	4	5
Displays understanding of how job relates to others	1	2	3	4	5
Uses resources effectively	1	2	3	4	5
 JUDGMENT	 1	 2	 3	 4	 5
Displays willingness to make decisions	1	2	3	4	5
Exhibits sound and accurate judgment	1	2	3	4	5
Supports and explains reasoning for decisions.....	1	2	3	4	5
Includes appropriate people in decision-making process.....	1	2	3	4	5
Makes timely decisions	1	2	3	4	5
 LEADERSHIP	 1	 2	 3	 4	 5
Exhibits confidence in self and others.....	1	2	3	4	5
Inspires respect and trust.....	1	2	3	4	5
Reacts well under pressure	1	2	3	4	5
Shows courage to take action.....	1	2	3	4	5
Motivates others to perform well	1	2	3	4	5
 MANAGING PEOPLE	 1	 2	 3	 4	 5
Provides direction and gains compliance.....	1	2	3	4	5
Includes subordinates in planning.....	1	2	3	4	5
Takes responsibility for subordinates' activities	1	2	3	4	5
Makes self available to subordinates	1	2	3	4	5
Provides regular performance feedback	1	2	3	4	5
Develops subordinates' skills and encourages growth	1	2	3	4	5
 PLANNING & ORGANIZATION	 1	 2	 3	 4	 5
Prioritizes and plans work activities	1	2	3	4	5
Uses time efficiently	1	2	3	4	5
Plans for additional resources.....	1	2	3	4	5
Integrates changes smoothly	1	2	3	4	5
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