

## 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



Employee name:

## SAMPLE PERFORMANCE EVALUATION FORM **ADMINISTRATIVE PERSONNEL**

Employment start date:				
Job title:				
Department:				
Review period start:				
Review period end:				
Last review date:				
Reviewer name:				
Reviewer title:				
PERFORMANCE COMPETENCIES				
COMMUNICATIONS1	2	3	4	5
Expresses ideas and thoughts verbally1	2	3	4	5
Expresses ideas and thoughts in written form1	2	3	4	5
Exhibits good listening and comprehension1	2	3	4	5
Keeps others adequately informed1	2	3	4	5
Uses appropriate communication methods1	2	3	4	5
COOPERATION1	2	3	4	5
Establishes and maintains effective relations1	2	3	4	5
Exhibits tact and consideration1	2	3	4	5
Displays positive outlook and pleasant manner1	2	3	4	5
Offers assistance and support to coworkers1	2	3	4	5
Works cooperatively in group situations1	2	3	4	5
Works actively to resolve conflicts	2	3	4	5



DEPENDABILITY1	2	3	4	5
Responds to requests for service and assistance	2	3	4	5
Follows instructions, responds to management direction	2	3	4	5
Takes responsibility for own actions	2	3	4	5
Commits to doing best job possible	2	3	4	5
Keeps commitments	2	3	4	5
Meets attendance and punctuality guidelines	2	3	4	5
INITIATIVE1	2	3	4	5
Volunteers readily1	2	3	4	5
Undertakes self-development activities	2	3	4	5
Seeks increased responsibilities	2	3	4	5
Takes independent actions and calculated risks	2	3	4	5
Looks for and takes advantage of opportunities	2	3	4	5
Asks for help when needed	2	3	4	5
JOB KNOWLEDGE1	2	3	4	5
Competent in required job skills and knowledge1	2	3	4	5
Exhibits ability to learn and apply new skills1	2	3	4	5
Keeps abreast of current developments1	2	3	4	5
Requires minimal supervision1	2	3	4	5
Displays understanding of how job relates to others1	2	3	4	5
Uses resources effectively	2	3	4	5
JUDGMENT1	2	3	4	5
Displays willingness to make decisions	2	3	4	5
Exhibits sound and accurate judgment1	2	3	4	5
Supports and explains reasoning for decisions1	2	3	4	5
Includes appropriate people in decision-making process1	2	3	4	5
Makes timely decisions1	2	3	4	5
PLANNING & ORGANIZATION1	2	3	4	5
				_
Prioritizes and plans work activities	2	3	4	5
Uses time efficiently	2	3	4	5 5
Plans for additional resources	2	3	4	5
Integrates changes smoothly1	2	3	4	5



Sets goals and objectives	2	3	4	5
Works in an organized manner1	2	3	4	5
PROBLEM SOLVING1	2	3	4	5
Identifies problems in a timely manner1	2	3	4	5
Gathers and analyzes information skillfully1	2	3	4	5
Develops alternative solutions	2	3	4	5
Resolves problems in early stages1	2	3	4	5
Works well in group problem-solving situations	2	3	4	5
QUALITY1	2	3	4	5
Demonstrates accuracy and thoroughness1	2	3	4	5
Displays commitment to excellence	2	3	4	5
Looks for ways to improve and promote quality1	2	3	4	5
Applies feedback to improve performance1	2	3	4	5
Monitors own work to ensure quality1	2	3	4	5
QUANTITY1	2	3	4	5
Meets productivity standards1	2	3	4	5
Completes work in timely manner1	2	3	4	5
Strives to increase productivity	2	3	4	5
Works quickly1	2	3	4	5
Achieves established goals1	2	3	4	5
USE OF TECHNOLOGY1	2	3	4	5
Demonstrates required skills1	2	3	4	5
Adapts to new technologies1	2	3	4	5
Troubleshoots problems1	2	3	4	5
Uses technology to increase productivity1	2	3	4	5
Keeps technical skills up to date	2	3	4	5

## **DEVELOPMENT PLANS**

## **FUTURE GOALS**



## **EMPLOYEE COMMENTS**

MPLOYEE ACKNOWLEDGMENT
nave reviewed this document and discussed the contents with my supervisor. I acknowledge that I have been dvised of my performance status, which does not necessarily imply that I agree with the evaluation.
mployee signature/Date
EVIEWER COMMENTS
eviewer 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 SKILLS1	2	3	4	5
Synthesizes complex or diverse information	2	3	4	5
Collects and researches data	2	3	4	5
Uses intuition and experience to complement data1	2	3	4	5
Identifies data relationships and dependencies	2	3	4	5
Designs workflows and procedures	2	3	4	5
INITIATIVE1	2	3	4	5
Volunteers readily1	2	3	4	5
Undertakes self-development activities1	2	3	4	5
Seeks increased responsibilities	2	3	4	5
Takes independent actions and calculated risks	2	3	4	5
Looks for and takes advantage of opportunities	2	3	4	5
Asks for help when needed	2	3	4	5
INNOVATION1	2	3	4	5
Displays original thinking and creativity1	2	3	4	5
Meets challenges with resourcefulness	2	3	4	5



Generates suggestions for improving work1	2	3	4	5
Develops innovative approaches and ideas1	2	3	4	5
JOB KNOWLEDGE1	2	3	4	5
Competent in required job skills and knowledge1	2	3	4	5
Exhibits ability to learn and apply new skills1	2	3	4	5
Keeps abreast of current developments1	2	3	4	5
Requires minimal supervision	2	3	4	5
Displays understanding of how job relates to others	2	3	4	5
Uses resources effectively	2	3	4	5
JUDGMENT1	2	3	4	5
	2			5
Displays willingness to make decisions		3	4	
Exhibits sound and accurate judgment	2	3	4	5
Supports and explains reasoning for decisions	2	3	4	5
Includes appropriate people in decision-making process	2	3	4	5
Makes timely decisions	2	3	4	5
ORAL COMMUNICATIONS1	2	3	4	5
Speaks clearly and persuasively1	2	3	4	5
Listens and gets clarification	2	3	4	5
Responds well to questions	2	3	4	5
Demonstrates group presentation skills	2	3	4	5
Participates in meetings1	2	3	4	5
PLANNING & ORGANIZATION1	2	3	4	5
Prioritizes and plans work activities	2	3	4	5
Uses time efficiently	2	3	4	5
Plans for additional resources	2	3	4	5
Integrates changes smoothly	2	3	4	5
Sets goals and objectives	2	3	4	5
Works in an organized manner	2	3	4	5
PROBLEM SOLVING1	2	3	4	5
Identifies problems in a timely manner	2	3	4	5
Gathers and analyzes information skillfully	2	3	4	5
Develops alternative solutions	2	3	4	5
Dovolope diterritative solutions	_	3	7	J



Resolves problems in early stages1	2	3	4	5
Works well in group problem-solving situations	2	3	4	5
	•	•	_	_
QUALITY1	2	3	4	5
Demonstrates accuracy and thoroughness1	2	3	4	5
Displays commitment to excellence	2	3	4	5
Looks for ways to improve and promote quality1	2	3	4	5
Applies feedback to improve performance	2	3	4	5
Monitors own work to ensure quality1	2	3	4	5
TEAMWORK1	2	3	4	5
Balances team and individual responsibilities	2	3	4	5
Exhibits objectivity and openness to others' views	2	3	4	5
Gives and welcomes feedback	2	3	4	5
Contributes to building a positive team spirit	2	3	4	5
Puts success of team above own interests	2	3	4	5
USE OF TECHNOLOGY1	2	3	4	5
Demonstrates required skills1	2	3	4	5
Adapts to new technologies1	2	3	4	5
Troubleshoots technological problems1	2	3	4	5
Uses technology to increase productivity1	2	3	4	5
Keeps technical skills up to date	2	3	4	5
WRITTEN COMMUNICATIONS1	2	3	4	5
Writes clearly and informatively1	2	3	4	5
Edits work for spelling and grammar1	2	3	4	5
Varies writing style to meet needs	2	3	4	5
Presents numerical data effectively	2	3	4	5
DEVELOPMENT PLANS	_	-	•	J

## **FUTURE GOALS**



## **EMPLOYEE COMMENTS**

EMPLOYEE ACKNOWLEDGMENT
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Employee signature/Date
REVIEWER COMMENTS
Reviewer signature/Date



Employee name:

# SAMPLE PERFORMANCE EVALUATION FORM MANAGEMENT PERSONNEL

Employment start date:				
Job title:				
Department:				
Review period start:				
Review period end:				
Last review date:				
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Reviewer title:				
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COMMUNICATIONS1	2	3	4	5
Expresses ideas and thoughts verbally1	2	3	4	5
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Exhibits good listening and comprehension1	2	3	4	5
Keeps others adequately informed	2	3	4	5
Uses appropriate communication methods1	2	3	4	5
COST CONSCIOUSNESS1	2	3	4	5
Works within approved budget1	2	3	4	5
Conserves organizational resources	2	3	4	5
Develops and implements cost-saving measures	2	3	4	5
Contributes to profits and revenue	2	3	4	5
DELEGATION1	2	3	4	5
Delegates work assignments	2	3	4	5
Matches the responsibility to the person1	2	3	4	5
Gives authority to work independently	2	3	4	5
Sets expectations and monitors delegated activities	2	3	4	5
Provides recognition for results	2	3	4	5



JOB KNOWLEDGE1	2	3	4	5
Competent in required job skills and knowledge1	2	3	4	5
Exhibits ability to learn and apply new skills1	2	3	4	5
Keeps abreast of current developments	2	3	4	5
Requires minimal supervision	2	3	4	5
Displays understanding of how job relates to others	2	3	4	5
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Exhibits sound and accurate judgment	2	3	4	5
Supports and explains reasoning for decisions	2	3	4	5
Includes appropriate people in decision-making process	2	3	4	5
Makes timely decisions1	2	3	4	5
LEADERSHIP1	2	3	4	5
Exhibits confidence in self and others	2	3	4	5
Inspires respect and trust	2	3	4	5
Reacts well under pressure	2	3	4	5
Shows courage to take action	2	3	4	5
Motivates others to perform well	2	3	4	5
MANAGING PEOPLE1	2	3	4	5
Provides direction and gains compliance	2	3	4	5
Includes subordinates in planning1	2	3	4	5
Takes responsibility for subordinates' activities	2	3	4	5
Makes self available to subordinates	2	3	4	5
Provides regular performance feedback	2	3	4	5
Develops subordinates' skills and encourages growth	2	3	4	5
PLANNING & ORGANIZATION1	2	3	4	5
Prioritizes and plans work activities1	2	3	4	5
Uses time efficiently1	2	3	4	5
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