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| 1. EMPLOYEE'S NAME - LAST, FIRST, MIDDLE<br>Mitchell, Brian  | 2. DEPARTMENT, BOARD OR COMMISSION<br>Research & Interpretation    | 3. DIVISION OR INSTITUTION<br>ALPLM                                  |
| 4. EMPLOYEE'S SOCIAL SECURITY NUMBER<br>[ ] [ ] [ ] - [ ] [ ] - 0 5 8 2  | 5. EMPLOYEE'S PAYROLL TITLE<br>Senior Public Service Administrator | 6. EMPLOYEE'S WORKING TITLE<br>Director of Research & Interpretation |
| 7. PERIOD OF REPORT<br>From: [ ] [ ] [ ] [ ] To: [ ] [ ] [ ] [ ]   |  |  |
| 8. TYPE OF REPORT<br><input checked="" type="checkbox"/> ANNUAL <input type="checkbox"/> FIRST PROBATIONARY <input type="checkbox"/> LAYOFF <input type="checkbox"/> OTHER (SPECIFY)<br><input type="checkbox"/> QUARTERLY <input type="checkbox"/> FINAL PROBATIONARY <input type="checkbox"/> DISCHARGE<br><input type="checkbox"/> INTERIM <input type="checkbox"/> SALARY INCREASE |  |  |

### GENERAL INFORMATION

Central Management Services requests disclosure of information that is necessary to accomplish its obligations, primarily the statutory purposes outlined under the Personnel Code (20 ILCS 415). Social Security numbers are used in the application and employment processes to identify and differentiate between candidates and/or employees. Confidentiality of Social Security numbers obtained through this form will be preserved as prescribed by 5 ILCS 179 et seq.

### PART I - REVIEW OF JOB DESCRIPTION

Review of the employee's job description is required to ensure the accuracy of the job description.

Does the job description accurately and directly relate to the objectives listed in the next part of this evaluation form?

☐ Yes ☒ No If No, attach a revision of the job description.

### PART II - APPRAISAL OF OBJECTIVES

The space below is to be used by the supervisor to document objectives set for the employee and to indicate the employee's accomplishments toward those objectives. Objectives are to be developed by the supervisor at the BEGINNING of the working period with input from the employee and the concurrence of higher management. Objectives should normally include maintenance activities as well as new initiatives. At the end of the evaluation period, the results toward the objective should be listed. NOTE: This box will expand as needed.

Serves as the agency's in-house expert and spokesperson on issues regarding historical accuracy and interpretive content.

\*Plans, develops, organizes, directs, and implements the policies and procedures and acts authoritatively on any policy making issues affecting the division.

\*Directs a team of scholars and historians in the collaborative process of reviewing agency materials.

\*Travels and appears before groups as spokesperson to promote the agency and its mission and goals and to present on research topics related to Abraham Lincoln, Illinois History and Midwest History.

\*In coordination with agency leadership, serves as the liaison between the ALPLM and other research institutions and centers.

\*Serves as full-line supervisor.

\*Develops and administers the division budget

\*In coordination with the Finance division, seeks and administers supplemental funding from various granting agencies.

\*Other duties as assigned.

NOTE: Performance evaluations are intended to be conducted annually. While a formal evaluation was not completed for Brian Mitchell, several measures have been taken to address and improve his performance. These efforts include ongoing communication and support to address areas of concerns related to Mr. Mitchell's performance.

**PART III - APPRAISAL OF EMPLOYEE PERFORMANCE CHARACTERISTICS**

Rate the employee for each performance characteristic by marking the box that best indicates the employee's level of achievement. Base each rating on the employee's demonstrated performance. Comments may be provided to explain a particular rating, and are **REQUIRED** when an "Exceptional" or "Unacceptable" rating is designated.

**Planning:** Assess the ability to develop a plan to complete the work.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

This position requires high level planning skills in order to assess incoming requests for feasibility and priority. In addition to prioritizing by due date, requests must be prioritized by internal vs. external and priority of project. Brian and his team often miss deadlines for providing content and edit in supporting the daily operations and ALPLM assigned projects and tasks. Example is failure to provide content for the Richard Hunt catalog despite repeated attempts and directives for Brian to do so. Another example is failure to provide content for the ALPLM digital AR project.

**Initiative:** Assess the ability to be enterprising and industrious to stay ahead of the job.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

Often when provided guidance and direction on how to improve project and initiatives Brian is hesitant to adjust and follow through. Examples include the approach to the Ghost Queue change out, Illinois History Conference, and History Happy hour. Brian refuses to address both minor and major programmatic changes despite multiple meetings and conversations in which he is instructed to do so. In addition, Brian does not insert an authoritative voice when conflict arises concerning interpretation. He is content to observe the exchanges and never assert the final say on institutional interpretation. He engages only when called upon directly. Examples are the exchanges on labels for the blockade document and Tide Turns. Brian's unwillingness to act as a front-line supervisor costs the agency valuable time and reduces efficiency.

**Quality:** Assess the level of accuracy, content and thoroughness of work.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

Overall, Brian provides professional product particularly when is a topic of specific interest to him. However, in the normal course of performing his duties he at times does not provide a quality product. As a front line supervisor, Brian is responsible for the quality and historical accuracy of the label content provided by his direct reports and additional, often significant edits frequently need to be by Brian's superiors before being released to the public. Example is the Here I Have Lived exhibit.

**Productivity:** Assess the amount of work completed in relation to expectations.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

Brian and by reflection his direct reports often focus on initiatives of personal interest over their duties and responsibilities to the ALPLM. Various divisions across the agency have complained about the responsiveness from Brian on routine tasks such as simple content review and assisting with tours.

**Knowledge:** Appraise familiarity with techniques and procedures needed to complete the work.

☐ Exceptional    ☒ Accomplished    ☐ Acceptable    ☐ Unacceptable

**Comments:**

Brian is a respected historian with thoughtful responses to all public and external inquiries. He is an engaging public speaker with positive responses from the organizations or individuals he teaches.

**Judgment:** Appraise ability to weigh alternatives and arrive at conclusions.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

This position requires the ability to navigate many different situations both in public and professionally in a way that is in alignment with the agency and State regulations. This includes knowing what level of access various individuals have to sensitive agency information and management-level decision making. Brian has frequently and repeatedly been provided guidance on numerous operational and project related issues that he fails to follow. For example, dealings with the fiscal department in regards to PAL grants or other spending require multiple communications and unnecessary meetings that are then repeated because chain of command was not followed costing agency personnel significant time in addressing these matters. Even after clear directives are given, Brian attempts to circumvent management directives by engaging in circular conversations or insisting on multiple meetings in an attempt to bypass management.

**Teamwork:** Assess the ability to work with others, when appropriate, to attain organizational goals and objectives.

☐ Exceptional    ☐ Accomplished    ☒ Acceptable    ☐ Unacceptable

**Comments:**

**Leadership:** Assess the ability to develop and guide subordinates or coworkers to successful completion of objectives through increasing their knowledge, skills and abilities, if applicable.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable    ☐ Not Applicable

**Comments:**

This position requires the management of highly specialized workers in a way that is consistent with not only their knowledge but also their position within the agency. Brian has failed to set acceptable professional boundaries, standards of professional decorum, and clear expectations. Brian has allowed behaviors such as yelling, physical intimidation, back-talk, and subversive conversations to continue and has failed to coach staff on acceptable workplace behavior. While Brian has been provided training in management and leadership - including support in disciplinary procedures - he has taken no steps to resolving the issues.

**Human Relations:** Assess the ability to establish and maintain rapport with personal contacts.

☐ Exceptional    ☒ Accomplished    ☐ Acceptable    ☐ Unacceptable

**Comments:**

Brian has proven to be adept in making and maintaining relationships with his fellow colleagues and outside partners. His work related to the 1908 Race Riot is commendable - though not sanctioned by Admin.

#### PART IV - EMPLOYEE DEVELOPMENT

**DEVELOPMENT AND TRAINING:** Identify any developmental or training activities the employee has completed since his/her last performance evaluation. Such training was taken as a result of (check one):

☒ supervisor's recommendation    ☐ employee's initiative    NOTE: This box will expand as needed.

Brian has already been provided resources in Outlook calendar management, mentoring, fiscal management and group training at the senior staff meetings in leadership and management.

Indicate recommendations for further development and training for purposes of preparing the employee for additional responsibilities or for the improvement of current job performance. NOTE: This box will expand as needed.

Brian will complete three (3) trainings specifically in management as chosen by or approved by his manager by February 2025.  
Brian will meet one-on-one with his supervisor weekly to review department assignments and staffing management.  
Brian will put all activities (internal and external) in his Outlook calendar and share his calendar with his supervisor for accuracy.

Brian will follow all HR procedures when dealing with the employees within his department including but not limited to setting a high professional standard of communication and work product in his department and using discipline when necessary.

Brian will comply with all directives given by the Executive Staff and ask for clarification as needed via email for continuity of conversation.

#### PART V - OVERALL PERFORMANCE RATING

Rate the employee's overall performance by marking the box that best indicates the employee's level of achievement. Supervisor's comments on the employee's overall performance may be documented on an attached sheet and are **REQUIRED** when an "Exceptional" or "Unacceptable" performance rating is designated.

|   |   |
|---|---|
| <input type="radio"/> Exceptional             | Overall, the employee consistently demonstrates outstanding performance and far exceeds expectations in the completion of established objectives. Additionally, the employee seeks, accepts and completes assignments outside the realm of the established objectives which results in a significant contribution to the agency.  |
| <input type="radio"/> Accomplished            | <b>Overall, the employee successfully carries out assigned duties and responsibilities; meets or exceeds expectations for productivity and quality on a regular basis; accepts and completes special assignments with diligence and concern for the desired outcomes; and exhibits appropriate trust and respect for coworkers and agency management. Employees rated as "accomplished" consistently display understanding and concern for agency goals and the objectives of their operational area.</b> |
| <input type="radio"/> Acceptable              | Overall, the employee meets the standards for the position, but for a number of reasons the general performance level cannot be characterized as "accomplished."  |
| <input checked="" type="radio"/> Unacceptable | Overall, the employee has not met the established objectives and standards of the job in a <b>significant number</b> of situations.   |

#### PART VI - EMPLOYEE'S COMMENTS

Employee may comment on all or any part of the information contained in this document, including the evaluation process. If the employee does not concur with the evaluation, check the appropriate box in Part IX and explain reasons for disagreement. NOTE: This box will expand as needed.

See Attached.

#### PART VII - OBJECTIVES FOR NEXT YEAR

Identify objectives for the next year in the space below. NOTE: This box will expand as needed.

After consideration of the comments provided, it is unclear if Brian would be willing to take direction toward improving his performance. ALPLM core values state that we are a learning-centered organization and prioritize continuous professional development. As evidenced throughout the year during conversations and now following the evaluation, Brian is always willing to be helpful and work hard but not always willing to admit a need for improvement or admit when his judgment has failed him.

I was hopeful that he would recognize his areas for growth and be willing to collaborate on strategies for improvement. However, improvement will be nearly impossible with an employee that sees no deficit. He has reached a point where his actual deficits are causing deficits in other areas of his performance and without the acknowledgment and attention to these problem areas, he will not be an effective employee.

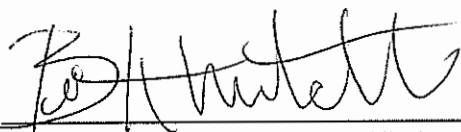
**PART VIII - PROGRESS REVIEW (This can be initiated by either the employee or the supervisor.)**

The employee and supervisor may meet to review progress toward previously established objectives. The employee and supervisor should date and initial the document at the time of each review.

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|-------------|---------------------------|-------------------|
| Date: _____ | Initials: Employee: _____ | Supervisor: _____ |
| Date: _____ | Initials: Employee: _____ | Supervisor: _____ |
| Date: _____ | Initials: Employee: _____ | Supervisor: _____ |

**PART IX. SIGNATURES**
☐ Check for Digital Signature Version - Uncheck for Hardcopy Signature Version



EMPLOYEE'S SIGNATURE

Senior Public Service Administrator

PAYROLL TITLE

12/5/2024

DATE

☒ I DO NOT CONCUR (use Part VI for Comments).

SUPERVISOR'S SIGNATURE

PAYROLL TITLE

DATE

☐ I HAVE PERSONALLY DISCUSSED THE CONTENT OF THIS DOCUMENT WITH THE EMPLOYEE.

AGENCY HEAD'S SIGNATURE

DATE

**Dr. Brian K. Mitchell (Evaluation Reply)**

The evaluation is labeled as an annual evaluation and the period of report is not filled in. Additionally, the evaluation lists incidents which occurred outside of the evaluation period.

On Thursday, October 24, 2024, you noted that you had presented me with the goals and objectives that appear on my evaluation form shortly after meeting with the Research Division on November 1, 2023. I have no subsequent email wherein you have presented me with the noted Goals and Objectives as you stated on my evaluation form on Thursday, Oct. 24, 2024. Please provide an email which shows that I was presented with these goals and objectives prior to the evaluation period.

On Weds., October 30, 2024, I asked you where the Goals and Objectives on my evaluation came from. You stated that "that my job description was merely pasted into the section for my goal and objectives." **On November 4, 2024, Human Resources consultant (John Chernich) hired by the Human Resource Director to train Senior Staff in the "Importance of Performance Evaluations" noted that "it is unacceptable to use job descriptions to replace goals and objectives because job descriptions are not measurable and therefore should not be used for performance evaluations." He also noted that "Goals and objectives should be established in a collaborative manner between the Supervisor and employee before the evaluation period."**

On October 24, 2024, you also maintained that my "evaluation was based on experience and observation," However several of the incidents noted in the evaluation involve conversations wherein you were not present or occurred prior to your employment with the ALPLM. **(Which is why I asked if you had prepared the evaluation, since you would not have observed the incidents or have experience of them)**

**Planning: My assigned rating – Unacceptable**

**Your Response:** This position requires high level planning skills to assess incoming requests for feasibility and priority. In addition to prioritizing by due date, requests must be prioritized by internal vs. external and priority of project. Brian and his team often miss deadlines for providing content and edit in supporting the daily operations and ALPLM assigned projects and tasks. Example is failure to provide

content for the Richard Hunt catalog despite repeated attempts and directives for Brian to do so. Another example is failure to provide content for the ALPLM digital AR project.

**My reply:** I wholeheartedly disagree with your rating! My team has never missed a changeout! We do not “often miss deadlines” as you have written. You provided two examples to justify your rating which are misrepresented and are untrue.

- 1.) Failure to provide content for ALPLM Digital AR project – **Never Happened!** When I asked for specifics as to what was not provided, you replied that you forget and that I could ask Jade. When I asked Jade, she referenced meeting with Christian and myself about the Auction Block exhibit in Journey One of the Museum (**See Email dated 5/29/2024**) but did not discuss anything that had not been delivered to her.
  - A. Christian and I met with Jade. She asked where the data in the exhibit space had come from. We pulled out the manuals from the design firm that build the exhibit while she was there. The manuals provide no information on where the data had come from. We informed her that we would assist her and her staff with the narratives that she was writing. There are no subsequent emails from Jade or yourself about requested content or materials or missed deadlines. (**You have no direct experience and could not have observed this since you were not in the meeting.**)
  - B. On 7/31/2024 we received our first request for the app. A review about the life of Robert Smalls.
  - C. On the same day, 7/31/2024, a review of the narrative was returned to Jade.
- 2.) Failure to provide content for the Richard Hunt catalog despite repeated attempts and directives for Brian to do so. -----**Misconstrued – Not Factual** – At the end of June / Early July – Christen Stanley and Lance Tawzer came to my office. At that meeting, I was informed that the Executive Director wanted me to provide a Chapter/Essay for the Richard Hunt catalog. At that point, I informed both Stanley and Tawzer that I was not an Art Historian and that I knew very little about Hunt’s artwork and that I believed that an Art Historian would be better suited for the task. I then suggested that the paid curator and catalog editor (Ross) could also do the chapter. I was told that the Executive Director desired me to do the chapter. I reminded both Stanley and Tawzer that we were short of historians in the office at that point (Christian was on vacation the last week in June and the first week in July). I reminded Stanley and Tawzer that I would be out of the office the second and the last week of July, but both maintained that I had to do the

essay. (see Supervisor Team Calendar for the month of July 2024 – E-time) I told Stanley that I did not know where to even begin with the subject or what to write about. I maintained that the Hunt Pieces that I had seen were all on HBCU campuses. Stanley and Tawzer replied that I should write about that...Hunt works which were on HBCU campuses. I asked the pair if I could have two months to research Hunt to write the chapter. I was told that the chapter was needed ASAP. I told them that I would work on the chapter but that was all I would be working on the rest of the month, if they hoped to have it completed ASAP. I was told that that was not an option, and I would be expected to do whatever was assigned to me since I was the only historian in the division at the time. On top of doing my own duties, I was also doing Christian McWhirter's (the Lincoln Historian- on vacation) and Jacob Friedfeld's (the Illinois Historian – who resigned) and was given some of Lauren's Dodge's (Development Director – who resigned) duties. During the same period, we were training a new Oral Historian (Scot Lyod – hired in June of 2024).

- Despite my request to be allowed to work solely on the Chapter/Essay upper management continued to assign additional tasks to me and demand that the new tasks assigned were also required ASAP. (Examples: Women's Baseball Essay – see Abigail Smerz emails dated 7/19 and 7/23; Abigail Bussey emails dated 6/28;) I was additionally assigned to review and edit the labels for the Richard Hunt Exhibit despite having a paid outside contractor - curator (Ross) who was curating the exhibit. I also required to edit the chapters/Essays of Art Historians who submitted Chapters for the Hunt Catalog (see emails from Lance Tawzer – Jon Ott -Sculpting Freedom – 7/3; Gilfoyle's – Altgeld's Ghost Essay – 7/3; Jordan's -Needful Things – 7/9; Reviewed and Edit a Revised -Jordan's – Needful Things – 7/17; ) I was also required to review and edit Ross's labels and subsequent drafts of labels for his exhibit – 6/7 – 6/18; I was additionally informed that I would have to give Ranger talks in the Little Lincoln theater – 06/27, 06/28, 07/05 , hosted a Corridor Conversation; wrote additional Script for the Ghost Queue Rails and amended labels per Lance's request 07/1; Worked with Daniel on software ERF and Manpower Contracts for PAL – 06/27 – 07/05; hosted the Gilder Lehrman Teachers' Workshop and attended evening events at the workshop 7/21 – 7/26; Conducted interviews for PAL Executive II Editors 7/25 – 7/26.
- Conversely, I and my team can provide numerous emails thanking us for our rapid replies to requests and our willingness to collaborate with other divisions and outside partners. Similarly, I can find no emails (out of those requesting the Hunt Essay/Chapter) which allege that we have

been late on anything. I repeatedly requested that the deadline for the Hunt assignment be amended to accommodate the deadline for requests during the same period. Daunted by the number of deadlines, I requested a list of prioritized work assignments. After receiving that list, several new assignments were given to me with immediate or same day deadlines. When asked how to deal with the mounting deadlines that were all ASAP, I was told that "all were required."

- Additionally, I have never received an email from or been counseled by my supervisor in this regard. We meet on a Bi-weekly basis to address work and scheduling and I have never received any sort of mention or complaint regarding my planning. On the contrary, I have been told that I and my division were doing a good job on numerous occasions. I would be happy to supply copies, but they are voluminous.

**Initiative:** My assigned rating - **Unacceptable**

**Your Response:** Often when provided guidance and direction on how to improve project and initiatives Brian is hesitant to adjust and follow through. Examples include the approach to the Ghost Queue change out, Illinois History Conference, and History Happy hour. Brian refuses to address both minor and major programmatic changes despite multiple meetings and conversations in which he is instructed to do so. In addition, Brian does not insert an authoritative voice when conflict arises concerning interpretation. He is content to observe the exchanges and never assert the final say on institutional interpretation. He engages only when called upon directly. Examples are the exchanges on labels for the blockade document and Tide Turns. Brian's unwillingness to act as a front-line supervisor costs the agency valuable time and reduces efficiency.

**My Reply:** I wholeheartedly disagree with your rating! Once again, your assessment does not concur with what occurred:

***The Ghost Queue Change out*** – My division did not disagree with the change out instructions. Our division was asked what the most challenging aspects of our jobs were since we had personnel losses. We went through our labor and task assessments with you and you sent an email to the executive director requesting that she amend the procedure for the Ghost Queue. The executive director responded to this email unfavorably to you, me, and a host of other staff involved with the Ghost Queue Changeout. Subsequent to the email, staff complained to union representatives about the language used in the executive director's response. You subsequently sent an email to all the employees involved on 11/22/

2023 - (Christen) - **My apologies. I obviously missed the mark by quite a wide margin, and I shouldn't have dragged all of you in with me.**

**Illinois History Conference** – Despite significant drop in staffing in my division. Christian and I worked hard to make sure that the conference was well-attended, profitable, engaging, and that the luncheons were sold out. Each year that I have served as Research Director the Conference has been better attended and more profitable than the proceeding year. This year there was a 71% increase in attendance and profit. The Luncheons were both sold out and attendees (including members of our Board of Trustees have commented on how well run the conference was. Despite all the positive things that could be said about the conference there were a few suggestions that were made that were not feasible:

- 1.) That we have session in the reading rooms: Having session in the reading rooms would have meant that we would have had to close the library to patrons. Many patrons travel from out of town and make appoints for research times months in advance. Many attendees take the opportunity to conduct research between sessions.
- 2.) We were asked to considered having the luncheon in the Treasury Building or in Union Station: In the instance of the Treasure Building, we would have had to pay for the venue, which would have greatly reduced profitability. The venue also had pillars and bad acoustics which would have impaired the viewing and / or hearing of the speakers. Lastly, our in-house review fit more people in it.

In the instance of Union Station, the acoustics were poor for a banquet style event.

**History Happy Hour** – History Happy Hour (HHH) was a collaborative program developed with the Illinois State Museum (ISM) wherein regional scholars were invited to give public lectures at a local bar (Anvil & Forge). The event pre-dates my tenure with the museum and has been popular with patrons and volunteers. After attending one of the HHH lectures, Chief of Staff said that he would like to change several features of the program, chiefly to allow non-historians to present and to change the venue. We informed Mark that since the program was collaborative, we would have to meet with our partner and have their agreement before we implemented any changes. We met with Jennifer Edgington – Interim Executive Director of ISM. At the meeting, Jennifer and I pointed out that patrons of HHH had always gone to Anvil and Forge and if we followed the initial suggestion of having a migrating venue, we were concerned that we would loose patrons because they would forget which venue we were at each month. Conversely, Mark maintained that we should allow all the bars in the area to benefit from a mid-week

event, not just a single bar. There were however several benefits which Mark failed to consider: **1. Anvil & Forge was next to the museum and employees and volunteers could attend after the museum closed in the evenings. 2. Everyone knew exact where the event was (no one would have to remember which venue the event was being held at month to month). 3. Families with children could attend HHH when it was at Anvil & Forge because they served food.**

Jennifer agreed to try other venues if that meant the continuation of the program. I was then told that I should rescind the invitations to the invited scholars and that museum staff would be invited to present for the four sessions we hosted that calendar year. **(I did exactly as I was asked! I called the invited speakers apologized and rescinded the invitations)** I then went with Mark and Joe Crain on a tour of local bars to inquire if the owners were interested in participating. Some local bars were interested others were not, some could accommodate our ADA requirements and others could not. Ultimately, we found one other venue, The Gin Joint. However, it did not serve food and therefore could not allow children on-site.

In every instance, I complied with every request made of me. We now have two venues and staff throughout the museum, not just historians, are presenting at HHH.

**In addition, Brian does not insert an authoritative voice when conflict arises concerning interpretation. He is content to observe the exchanges and never assert the final say on institutional interpretation. He engages only when called upon directly. Examples are the exchanges on labels for the blockade document and Tide Turns. Brian's unwillingness to act as a front-line supervisor costs the agency valuable time and reduces efficiency.**

There are several experts with terminal degrees in my division. When confronted with a project, programming, or an exhibit I rely heavily upon the knowledge and experience of the Lincoln Scholar (Christian McWhirter) and the Papers of Abraham Lincoln Director (Daniel Worthington). As experts on those topics, I call upon them to give their professional opinions. I have been told repeatedly that I am not the final say or authority regarding interpretation and quite often Senior Staff with no academic backgrounds in History are allowed to ignore, supersede, amend, and alter interpretation for the Research Division. One example was the Blockade document. Wherein the interpretation of the Lincoln Scholar, the Director of PAL, and myself were ignored in favor of the interpretation of an auction house, the acquisitions director, and the Communications Director.

**Quality:** My assigned rating was **Unacceptable**

**Your Response:** Overall, Brian provides professional product particularly when is a topic of specific interest to him. However, in the normal course of performing his duties he at times does not provide a quality product. As a front-line supervisor, Brian is responsible for the quality and historical accuracy of the label content provided by his direct reports and additional, often significant edits frequently need to be by Brian's superiors before being released to the public. Example is the Here I Have Lived exhibit.

**My Reply:** I wholeheartedly disagree with your rating! Once again, your assessment does not concur with what occurred:

All labels go through a rigorous review process. The historians send the labels to me. When there were two historians on staff (before Jake left) the labels would go from the historian who wrote the label to the one who did not. After that review, the labels would be emailed to me for review. After my review, the emails were sent to the Operations manager (Toby or Christen) and lastly, the labels were sent to the executive director for final review. The executive director has final say on all labels. I was instructed that the executive director is the final say on all labels. I have instructed the historians on my staff to include all word changes and corrections sent to us by the executive director expect in the instances when her corrections were historically incorrect.

In the case of the "Here I have lived" the executive director marked two items as historically inaccurate which proved subsequently to be accurate. (See **emails between Jacob Friefeld and Brian Mitchell - November 10 – 18 labeled: Here I have Lived (Home) label edits**)

There are three additional problems with my rating in quality. 1.) Your assessment of the "Here I have Lived" exhibit is outside of the evaluation period. **The Labels for this exhibit were approved in November of 2022.** 2.) **Your assessment of the work done by the Research Division on the "Here I have lived" exhibit is also refuted by the fact the exhibit won a National Award of Excellence from the American Association of State and Local History.** 3.) Since the incident described as problematic occurred in 2022, you could not have personally observed or experienced the incident. (Which is why I asked if the evaluation had been written by you.)

**Productivity:** My Assigned rating was **Unacceptable**

**Your Response:** Brian and by reflection his direct reports often focus on initiatives of personal interest over their duties and responsibilities to the ALPLM. Various divisions across the agency have complained about the responsiveness from Brian on routine tasks such as simple content review and assisting with tours.

**My Reply:** I wholeheartedly disagree with your rating! Once again, your assessment does not concur with what occurred.

In several of your replies you have maintained that I and my staff have focused on “Initiatives of personal interest” without providing details as to what these initiatives or personal interests are. Each of my staff have academic areas of specialty which can be considerably different from areas of personal interest. They have been professionally trained as specialists in those areas and when called upon to answer questions regarding that subject matter I rely heavily on their expertise. Christian is our Lincoln Scholar and is also a specialist in Civil War Era Music and Popular Culture; Daniel (Director of the Papers of Abraham Lincoln) is an expert on 19<sup>th</sup> Century Political History, Jacob was our Mid-Western Historian and had a specialty in Mid-Western and Illinois History. My specialties are in African American History, Public, Urban, Race & Ethnicity and Reconstruction. Work and talks are most often assigned via the specifics of the request. Example: Questions on the Life and Legacy of Abraham Lincoln will most often be directed to Christian or Daniel. While questions on Settlers, Native Americans, or railroads in the state would be directed to Jacob. You maintain that various divisions across the agency have complained about the responsiveness of the Research Division. However, I have received no such complaints from Senior management, nor have I received such a complaint from any division head. Content review and tours are a regular component of my division’s work. We regularly review content and provide a quick turnaround on content review...often on the same day the review is requested. Similarly, we regularly conducted tours and we have never refused a tour. I have personally come out to the museums on Saturdays and have on multiple occasions been forced to reschedule or cancel meetings or events to accommodate a VIP Tour. We have never refused a tour or refused to assist with a tour.

There is plenty of evidence to refute these claims. I would be happy to submit numerous emails wherein content is submitted as requested and/or before it was anticipated. I can similarly supply you with numerous emails from VIP Guests, School Teachers and thank you cards praising my division for their

hard work. Additionally, it is impossible to address a specific reply to your assessment because you have provided no dates, identifying details, or emails which would allow me to identify a specific complaint.

**Judgement:** My assigned rating was **Unacceptable**

**Your Response:** This position requires the ability to navigate many different situations both in public and professionally in a way that is in alignment with the agency and State regulations. This includes knowing what level of access various individuals have to sensitive agency information and management-level decision making. Brian has frequently and repeatedly been provided guidance on numerous operational and project related issues that he fails to follow. For example, dealings with the fiscal department in regards to PAL grants or other spending require multiple communications and unnecessary meetings that are then repeated because chain of command was not followed costing agency personnel significant time in addressing these matters. Even after clear directives are given, Brian attempts to circumvent management directives by engaging in circular conversations or insisting on multiple meetings in an attempt to bypass management.

**My Reply:** I wholeheartedly disagree with your rating! Once again, your assessment does not concur with what occurred.

On Thursday, October 24, 2024, when I asked my supervisor to explain my Unacceptable rating, I was told that I had revealed the purchase of the 21-star flag to the Union. I replied to this accusation by asserting that I did no such thing. I then reminded my supervisor that I did not know about the purchase of the flag until Collective Bargaining Unit employees brought it to my attention. Christen replied that she thought she heard me say that I had told the union stewards about the flag. I told her that I never talked to the union stewards about the flag. I retorted that I was asked if I was on the institution's Collection Committee and if I was the only senior staff member on the committee. My membership on the committee is public information as are the names of all the other committee members. The allegation is totally spurious and wholly untrue. The 21-star flag's purchase is at the heart of an ongoing OIG investigation and prompted [an article by the associated press.](#)

I similarly disagree with your statement that: **"Brian has frequently and repeatedly been provided guidance on numerous operational and project related issues that he fails to follow. For example, dealings with the fiscal department in regards to PAL grants or other spending require multiple**

**communications and unnecessary meetings that are then repeated because chain of command was not followed costing agency personnel significant time in addressing these matters. Even after clear directives are given, Brian attempts to circumvent management directives by engaging in circular conversations or insisting on multiple meetings in an attempt to bypass management.”**

Since January 1, 2024, I have had only two or three meetings with Fiscal. The earliest was called by Lauren Dodge on 4/15/2024 Titled: Touch base on Pal – after Senior Staff. The next was next was on or about July 3, 2024, after I received an email from Tammy (CFO) noting that she had run into “a snafu” with the Manpower contract for PAL staff. Subsequent of her problem with the contract she asked if I would walk around the contract and get signatures and bring it back to her. I did exactly what Tammy asked. Outside of those meetings, I have no idea of what you are talking about. I did a count on emails to Tammy during the same period and came back with some 14 emails regarding PAL. Most of those emails were about ERFs or contracts regarding PAL or Oral History and those email chains are mainly replies to requests from fiscal and are therefore not inquiries sent by me.

**Leadership:** My assigned rating was **Unacceptable**.

**Your Response:** This position requires the management of highly specialized workers in a way that is consistent with not only their knowledge but also their position within the agency. Brian has failed to set acceptable professional boundaries, standards of professional decorum, and clear expectations. Brian has allowed behaviors such as yelling, physical intimidation, back-talk, and subversive conversations to continue and has failed to coach staff on acceptable workplace behavior. While Brian has been provided training in management and leadership - including support in disciplinary procedures - he has taken no steps to resolving the issues.

**My Reply:** I wholeheartedly disagree with your rating! Once again, your assessment does not concur with what occurred.

My policy within my division has been for my subordinates to speak freely and to address their concerns freely and candidly. The incidents you described as yelling and back-talk are two distinctly different incidents, and neither is described in detail in the evaluation. Both incidents were related to decisions made by Executive Management which I had no control over. In both incidents, I did not display anger and aggression —nor was I accused of yelling, berating, shaming, and otherwise demonstrating unprofessional and abusive behavior in the workplace.

**Incident #1:** Involved the director of PAL and was in reply to his repeatedly unanswered requests regarding his staff and PAL grants. Daniel vented his frustrations that Human Resources and Executive staff refused to reply to his and his staff's inquiries. I reassured him that I had forwarded his questions and concerns to my superiors.

After Daniel calmed down, we discussed his tone and language, and he emailed a written apology to me.

**Incident #2:** Involved the Lincoln Scholar, Christian, and yourself. Unbeknownst to me, you contacted the Christian and asked him to reach out to the Clinton Presidential Library and Museum and to assist them in setting up a programming events around Lincoln and popular culture (his specialty.) Christian did as he was instructed and contacted the museum. Staff at the Clinton Museum asked if Christian would be willing to go to the museum to do the presentations in person.

I became aware of your request when I was informed by Christian that he had been contacted by you and asked to arrange and set-up the engagement (on Lincoln in the movies and Lincoln in popular culture). After being informed, I told Christian to check his schedule to ensure that there were no conflicting engagements or appointments. After checking his calendar and finding no engagements, Christian sent me a request for travel. Knowing that the request had come from you, I approved the travel form and sent it to you for Executive staff approval. You subsequently came to my office and told me that you did not want Christian to go to the museum. You then told Christian that you would cancel the engagement. The engagement was not cancelled, and the Director of Acquisition was sent in place of the Lincoln Scholar. Christian was upset with the decision to cancel the event after all the work he had put into arranging at your request and was even more upset when he discovered that the event had not been canceled and that the Director of Acquisitions had been sent in his place.

Christian's reply to this was to tell me that he had gone above and beyond to ensure that the Clinton staff were given all the attention and assistance they required. He said that he had reached out to the museum on your request and had done everything he could to accommodate their requests. His frustrations came from doing what he was instructed and later being told that he had done something incorrectly.

I listened to Christian's concerns and allowed him to vent his frustrations. After allowing him to vent, I told him that out-of-state travel must be approved by executive staff and informed him that work assignments are subject to your approval.

In both instances, I explained to you that decisions made by executive staff, that were beyond my control had caused problems within my division. In both instances, the cause of these problems were communication issues that were avoidable. It is also important to note that you did not personally observe or experience either incident.

I do not believe that my actions were objectionable or could be described as poor leadership. The answer to every upset employee is not discipline.

Lastly, the evaluation purports that I have received training on the disciplining of employees. I have never received training on disciplining employees in-person or virtually. Please supply a date and details regarding this training.

\*\*\* On December 5, 2024, I received a Merit Compensation and Performance evaluation form which had been altered from the original form that I was presented with on October 24, 2024. The email with the attached form noted that it needed to be signed and submitted by the close of day on December 5, 2024. The email noted that my supervisor, Ms. Stanley

Respectfully,

Dr. Brian K. Mitchell

## Mitchell, Brian

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**From:** Stanley, Christen  
**Sent:** Thursday, December 5, 2024 1:02 PM  
**To:** Mitchell, Brian  
**Subject:** RE: Annual Evaluation  
**Attachments:** B. Mitchell CMS201\_Employee Evaluation 2024 Final.pdf; BKM\_2024 Evaluation Reply.docx

Brian,

After careful deliberation, I have determined that your evaluation will not be adjusted. I will need your review, signature and additional comments by the end of the day today, please.

Best,  
Christen

**Christen Stanley**, *Chief Operating Officer* {She/Her}  
Abraham Lincoln Presidential Library and Museum  
217.558.8893 | 217.720.0654 [christen.stanley@illinois.gov](mailto:christen.stanley@illinois.gov)

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**From:** Mitchell, Brian <[Brian.Mitchell@Illinois.gov](mailto:Brian.Mitchell@Illinois.gov)>  
**Sent:** Thursday, November 14, 2024 11:24 AM  
**To:** Stanley, Christen <[Christen.Stanley@Illinois.gov](mailto:Christen.Stanley@Illinois.gov)>  
**Subject:** RE: Annual Evaluation

Christen,

I should be back and on my normal schedule from Nov. 20 – 22.

Best,  
Brian

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**From:** Stanley, Christen <[Christen.Stanley@Illinois.gov](mailto:Christen.Stanley@Illinois.gov)>  
**Sent:** Thursday, November 14, 2024 9:51 AM  
**To:** Mitchell, Brian <[Brian.Mitchell@Illinois.gov](mailto:Brian.Mitchell@Illinois.gov)>  
**Cc:** BRIAN MITCHELL <[bkmitchell@prodigy.net](mailto:bkmitchell@prodigy.net)>  
**Subject:** RE: Annual Evaluation

Hi Brian,

I apologize – I was going through my emails and noticed I did not respond here. Thank you for the attachment. I have read it and considered it. As I had mentioned when we met, I was only looking for 2-3 examples to help me understand your perspective on the items with which you disagreed. I don't believe that further submissions will be necessary. We'll have to meet next week when both of us are back in Springfield at the same time. I know it is a busy week so please let me know when you are available.

Best,  
Christen

**Christen Stanley**, Chief Operating Officer {She/Her}  
Abraham Lincoln Presidential Library and Museum  
217.558.8893 | 217.720.0654 [christen.stanley@illinois.gov](mailto:christen.stanley@illinois.gov)

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**From:** Mitchell, Brian <[Brian.Mitchell@Illinois.gov](mailto:Brian.Mitchell@Illinois.gov)>  
**Sent:** Wednesday, November 6, 2024 5:16 PM  
**To:** Stanley, Christen <[Christen.Stanley@Illinois.gov](mailto:Christen.Stanley@Illinois.gov)>  
**Cc:** BRIAN MITCHELL <[bkmitchell@prodigy.net](mailto:bkmitchell@prodigy.net)>  
**Subject:** RE: Annual Evaluation

Christen,

I have replied to my annual evaluation in the enclosed attachment. Additionally, I have numerous printed copies, e-time calendars, outlook calendars for meetings, emails, thank you cards from teachers, patrons, donors, VIP's that were given tours, and volunteers. I also have scores of emails citing that assignments were submitted as requested and often before deadlines. Please let me know if you would like me to supply copies and how you prefer these items submitted. I would have attached but the file would have been enormous. As always, I would be happy to comply. Please feel free to reply with instructions regarding this materials submission.

Sincerely,  
Brian

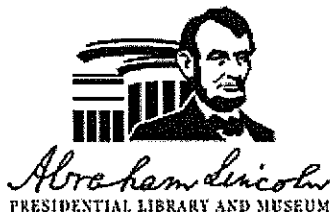
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**From:** Stanley, Christen <[Christen.Stanley@Illinois.gov](mailto:Christen.Stanley@Illinois.gov)>  
**Sent:** Thursday, October 24, 2024 3:17 PM  
**To:** Mitchell, Brian <[Brian.Mitchell@Illinois.gov](mailto:Brian.Mitchell@Illinois.gov)>  
**Subject:** Annual Evaluation

Hi Brian,

Here is a digital copy for you to work from. I have tentatively scheduled a follow-up meeting for next week on the 30<sup>th</sup> at 2:30. The conference rooms are unavailable so could we meet in my office?

Best,  
Christen



**Christen E. Stanley (she/her/hers)**  
Chief Operating Officer  
Abraham Lincoln Presidential Library and Museum  
217-558-8893 office, 217-720-0654 cell  
212 N 6th Street  
Springfield, IL 62701  
[www.PresidentLincoln.Illinois.gov](http://www.PresidentLincoln.Illinois.gov)

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|  |  |  |
|--|--|--|
| 1. EMPLOYEE'S NAME - LAST, FIRST, MIDDLE<br>Mitchell, Brian  | 2. DEPARTMENT, BOARD OR COMMISSION<br>Research & Interpretation    | 3. DIVISION OR INSTITUTION<br>ALPLM                                  |
| 4. EMPLOYEE'S SOCIAL SECURITY NUMBER<br>[ ][ ] - [ ][ ] - 0 5 8 2  | 5. EMPLOYEE'S PAYROLL TITLE<br>Senior Public Service Administrator | 6. EMPLOYEE'S WORKING TITLE<br>Director of Research & Interpretation |
| 7. PERIOD OF REPORT<br>From: [ ][ ][ ] To: [ ][ ][ ]   |  |  |
| 8. TYPE OF REPORT<br><input checked="" type="checkbox"/> ANNUAL <input type="checkbox"/> FIRST PROBATIONARY <input type="checkbox"/> LAYOFF <input type="checkbox"/> OTHER (SPECIFY)<br><input type="checkbox"/> QUARTERLY <input type="checkbox"/> FINAL PROBATIONARY <input type="checkbox"/> DISCHARGE<br><input type="checkbox"/> INTERIM <input type="checkbox"/> SALARY INCREASE |  |  |

### GENERAL INFORMATION

Central Management Services requests disclosure of information that is necessary to accomplish its obligations, primarily the statutory purposes outlined under the Personnel Code (20 ILCS 415). Social Security numbers are used in the application and employment processes to identify and differentiate between candidates and/or employees. Confidentiality of Social Security numbers obtained through this form will be preserved as prescribed by 5 ILCS 179 et seq.

### PART I - REVIEW OF JOB DESCRIPTION

Review of the employee's job description is required to ensure the accuracy of the job description.

Does the job description accurately and directly relate to the objectives listed in the next part of this evaluation form?

☐ Yes    ☒ No    If No, attach a revision of the job description.

### PART II - APPRAISAL OF OBJECTIVES

The space below is to be used by the supervisor to document objectives set for the employee and to indicate the employee's accomplishments toward those objectives. Objectives are to be developed by the supervisor at the BEGINNING of the working period with input from the employee and the concurrence of higher management. Objectives should normally include maintenance activities as well as new initiatives. At the end of the evaluation period, the results toward the objective should be listed. NOTE: This box will expand as needed.

Serves as the agency's in-house expert and spokesperson on issues regarding historical accuracy and interpretive content.

Plans, develops, organizes, directs, and implements the policies and procedures and acts authoritatively on any policy making issues affecting the division.

Directs a team of scholars and historians in the collaborative process of reviewing agency materials.

Travels and appears before groups as spokesperson to promote the agency and its mission and goals and to present on research topics related to Abraham Lincoln, Illinois History and Midwest History.

In coordination with agency leadership, serves as the liaison between the ALPLM and other research institutions and centers.

Serves as full-line supervisor.

Develops and administers the division budget

In coordination with the Finance division, seeks and administers supplemental funding from various granting agencies.

Other duties as assigned.

**PART III - APPRAISAL OF EMPLOYEE PERFORMANCE CHARACTERISTICS**

Rate the employee for each performance characteristic by marking the box that best indicates the employee's level of achievement. Base each rating on the employee's demonstrated performance. Comments may be provided to explain a particular rating, and are **REQUIRED** when an "Exceptional" or "Unacceptable" rating is designated.

**Planning:** Assess the ability to develop a plan to complete the work.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

This position requires high level planning skills in order to assess incoming requests for feasibility and priority. In addition to prioritizing by due date, requests must be prioritized by internal vs. external and priority of project. Brian and his team often miss deadlines for providing content and edit in supporting the daily operations and ALPLM assigned projects and tasks. Example is failure to provide content for the Richard Hunt catalog despite repeated attempts and directives for Brian to do so. Another example is failure to provide content for the ALPLM digital AR project.

**Initiative:** Assess the ability to be enterprising and industrious to stay ahead of the job.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

Often when provided guidance and direction on how to improve project and initiatives Brian is hesitant to adjust and follow through. Examples include the approach to the Ghost Queue change out, Illinois History Conference, and History Happy hour. Brian refuses to address both minor and major programmatic changes despite multiple meetings and conversations in which he is instructed to do so. In addition, Brian does not insert an authoritative voice when conflict arises concerning interpretation. He is content to observe the exchanges and never assert the final say on institutional interpretation. He engages only when called upon directly. Examples are the exchanges on labels for the blockade document and Tide Turns. Brian's unwillingness to act as a front-line supervisor costs the agency valuable time and reduces efficiency.

**Quality:** Assess the level of accuracy, content and thoroughness of work.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

Overall, Brian provides professional product particularly when is a topic of specific interest to him. However, in the normal course of performing his duties he at times does not provide a quality product. As a front line supervisor, Brian is responsible for the quality and historical accuracy of the label content provided by his direct reports and additional, often significant edits frequently need to be by Brian's superiors before being released to the public. Example is the Here I Have Lived exhibit.

**Productivity:** Assess the amount of work completed in relation to expectations.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

Brian and by reflection his direct reports often focus on initiatives of personal interest over their duties and responsibilities to the ALPLM. Various divisions across the agency have complained about the responsiveness from Brian on routine tasks such as simple content review and assisting with tours.

**Knowledge:** Appraise familiarity with techniques and procedures needed to complete the work.

☐ Exceptional    ☒ Accomplished    ☐ Acceptable    ☐ Unacceptable

**Comments:**

Brian is a respected historian with thoughtful responses to all public and external inquiries. He is an engaging public speaker with positive responses from the organizations or individuals he teaches.

**Judgment:** Appraise ability to weigh alternatives and arrive at conclusions.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable

**Comments:**

This position requires the ability to navigate many different situations both in public and professionally in a way that is in alignment with the agency and State regulations. This includes knowing what level of access various individuals have to sensitive agency information and management-level decision making. Brian has frequently and repeatedly been provided guidance on numerous operational and project related issues that he fails to follow. For example, dealings with the fiscal department in regards to PAL grants or other spending require multiple communications and unnecessary meetings that are then repeated because chain of command was not followed costing agency personnel significant time in addressing these matters. Even after clear directives are given, Brian attempts to circumvent management directives by engaging in circular conversations or insisting on multiple meetings in an attempt to bypass management.

**Teamwork:** Assess the ability to work with others, when appropriate, to attain organizational goals and objectives.

☐ Exceptional    ☐ Accomplished    ☒ Acceptable    ☐ Unacceptable

**Comments:**

**Leadership:** Assess the ability to develop and guide subordinates or coworkers to successful completion of objectives through increasing their knowledge, skills and abilities, if applicable.

☐ Exceptional    ☐ Accomplished    ☐ Acceptable    ☒ Unacceptable    ☐ Not Applicable

**Comments:**

This position requires the management of highly specialized workers in a way that is consistent with not only their knowledge but also their position within the agency. Brian has failed to set acceptable professional boundaries, standards of professional decorum, and clear expectations. Brian has allowed behaviors such as yelling, physical intimidation, back-talk, and subversive conversations to continue and has failed to coach staff on acceptable workplace behavior. While Brian has been provided training in management and leadership - including support in disciplinary procedures - he has taken no steps to resolving the issues.

**Human Relations:** Assess the ability to establish and maintain rapport with personal contacts.

☐ Exceptional    ☒ Accomplished    ☐ Acceptable    ☐ Unacceptable

**Comments:**

Brian has proven to be adept in making and maintaining relationships with his fellow colleagues and outside partners. His work related to the 1908 Race Riot is commendable - though not sanctioned by Admin.

## PART IV - EMPLOYEE DEVELOPMENT

**DEVELOPMENT AND TRAINING:** Identify any developmental or training activities the employee has completed since his/her last performance evaluation. Such training was taken as a result of (check one):

☒ supervisor's recommendation    ☐ employee's initiative    NOTE: This box will expand as needed.

Brian has already been provided resources in Outlook calendar management, mentoring, fiscal management and group training at the senior staff meetings in leadership and management.

Indicate recommendations for further development and training for purposes of preparing the employee for additional responsibilities or for the improvement of current job performance. NOTE: This box will expand as needed.

Brian will complete three (3) trainings specifically in management as chosen by or approved by his manager by February 2025.  
Brian will meet one-on-one with his supervisor weekly to review department assignments and staffing management.  
Brian will put all activities (internal and external) in his Outlook calendar and share his calendar with his supervisor for accuracy.

Brian will follow all HR procedures when dealing with the employees within his department including but not limited to setting a high professional standard of communication and work product in his department and using discipline when necessary.

Brian will comply with all directives given by the Executive Staff and ask for clarification as needed via email for continuity of conversation.

#### PART V - OVERALL PERFORMANCE RATING

Rate the employee's overall performance by marking the box that best indicates the employee's level of achievement. Supervisor's comments on the employee's overall performance may be documented on an attached sheet and are **REQUIRED** when an "Exceptional" or "Unacceptable" performance rating is designated.

|   |   |
|---|---|
| <input type="radio"/> Exceptional             | Overall, the employee consistently demonstrates outstanding performance and far exceeds expectations in the completion of established objectives. Additionally, the employee seeks, accepts and completes assignments outside the realm of the established objectives which results in a significant contribution to the agency.  |
| <input type="radio"/> Accomplished            | <b>Overall, the employee successfully carries out assigned duties and responsibilities; meets or exceeds expectations for productivity and quality on a regular basis; accepts and completes special assignments with diligence and concern for the desired outcomes; and exhibits appropriate trust and respect for coworkers and agency management. Employees rated as "accomplished" consistently display understanding and concern for agency goals and the objectives of their operational area.</b> |
| <input type="radio"/> Acceptable              | Overall, the employee meets the standards for the position, but for a number of reasons the general performance level cannot be characterized as "accomplished."  |
| <input checked="" type="radio"/> Unacceptable | Overall, the employee has not met the established objectives and standards of the job in a <b>significant number</b> of situations.   |

#### PART VI - EMPLOYEE'S COMMENTS

Employee may comment on all or any part of the information contained in this document, including the evaluation process. If the employee does not concur with the evaluation, check the appropriate box in Part IX and explain reasons for disagreement. NOTE: This box will expand as needed.

#### PART VII - OBJECTIVES FOR NEXT YEAR

Identify objectives for the next year in the space below. NOTE: This box will expand as needed.

**PART VIII - PROGRESS REVIEW (This can be initiated by either the employee or the supervisor.)**

The employee and supervisor may meet to review progress toward previously established objectives. The employee and supervisor should date and initial the document at the time of each review.

|  |  |  |
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|             |                           |                   |
|-------------|---------------------------|-------------------|
| Date: _____ | Initials: Employee: _____ | Supervisor: _____ |
| Date: _____ | Initials: Employee: _____ | Supervisor: _____ |
| Date: _____ | Initials: Employee: _____ | Supervisor: _____ |

**PART IX. SIGNATURES** ☐ Check for Digital Signature Version - Uncheck for Hardcopy Signature Version

|  |                                     |      |
|--|-------------------------------------|------|
|  | Senior Public Service Administrator |      |
| EMPLOYEE'S SIGNATURE   | PAYROLL TITLE                       | DATE |
| <input type="checkbox"/> I DO NOT CONCUR (use Part VI for Comments).                                 |                                     |      |
|  |                                     |      |
| SUPERVISOR'S SIGNATURE   | PAYROLL TITLE                       | DATE |
| <input type="checkbox"/> I HAVE PERSONALLY DISCUSSED THE CONTENT OF THIS DOCUMENT WITH THE EMPLOYEE. |                                     |      |
|  |                                     |      |
| AGENCY HEAD'S SIGNATURE  |                                     | DATE |