

CITY OF STAMFORD, CONNECTICUT



RFP# 814

DEVELOPMENT OF ENTRY LEVEL AND PROMOTIONAL POLICE AND FIRE EXAMINATIONS

Submitted to:

City of Stamford
Purchasing Department
Attn: Vanesa Francis, Human Resources Generalist
888 Washington Blvd
Stamford, CT 06901
Telephone: (203) 977-4733

December 7, 2020



Morris & McDaniel, Inc.
Management Consultants

David M. Morris, Ph.D., J.D., President

117 South Saint Asaph Street, Alexandria, VA 22314 • Telephone: (703) 836-3600
contact@morrisandmcdaniel.com • www.morrisandmcdaniel.com



Morris & McDaniel
Management Consultants

117 South Saint Asaph Street
Alexandria, VA 22314
Telephone: 703-836-3600
Fax: 703-836-4280
www.morrisandmcdaniel.com

December 07, 2020

Vanessa Francis, Human Resources Generalist
City of Stamford, Purchasing Department
888 Washington Blvd
Stamford, CT 06901
Telephone: (203) 977-4733

Dear Ms. Francis:

Morris & McDaniel is pleased to submit our response to RFP #814, Proposal for Entry-Level and Promotional Police and Fire Examinations. Per the RFP, we acknowledge that the contract agreement shall become effective immediately upon the execution of an agreement by all parties and shall remain in effect for three (3) years from the date of signing, with the City offering the option to extend the engagement annually for two (2) additional option years. The information provided in our proposal describes our experience and background related to the development and administration of entry level and promotional assessments that identify individuals who are best qualified for the positions. We strive to incorporate best practices currently used in the field of testing. The content of this response remains valid and available to the City of Stamford (December 10, 2020, at 4:00 P.M., Eastern Time). Morris & McDaniel acknowledges receipt of Addendum No. 1, dated November 16, 2020. The financial data quoted in the proposal will not change for a period of one hundred twenty (120) days after the receipt date at the City of Stamford of this offer.

We know our firm has the depth of professional experience in protective service work required for this project. Morris & McDaniel has a long and successful history of service to fire and police jurisdictions throughout the United States. Our record of superior performance extends over forty-four (44) years. Our firm is the only firm providing promotional testing services to NYPD and FDNY according to a release from the City of New York (see Appendix A) and further, we received an A+ vendor grading in these promotional services for the City (Appendix B). The Morris & McDaniel entry-level police test was one of three (3) approved to be used by FDLE. The U.S. Department of Justice reported our test to be the better test in comparison to one of the other two (Appendix C). Some of our fire service clients include Houston Fire Department, Kansas City Fire Department, Norfolk Fire Department, Newport News Fire Department, Alexandria Fire Department, New York Fire Department and Jackson Fire Department. Some of our law enforcement clients include Austin Police Department, Durham Police Department, Norfolk Police Department, Newport News Police Department, Jackson Police Department, and Alexandria Police Department. We are pleased that, among the many clients around the country that we have served well, we can include the Stamford Fire and Police Departments, where we have conducted entry-level and promotional processes. We are enthusiastic about the opportunity to demonstrate our abilities to render the highest caliber of professional service again.



Erik Lawson
City of Stamford, Purchasing Manager
December 7, 2020
Page 2

We have paid particular attention to the requested information by the City of Stamford as outlined in RFP #814, and we believe this response package is responsive to the information you require and will demonstrate why Morris & McDaniel will best serve the needs of the Stamford Police Department and the Stamford Fire Department specifically as follows:

Test Validation and Promotional Assessment Expertise

Morris & McDaniel is a national leader in conducting test, development, validation and assessment projects. We have been recognized by the Society of Industrial Organizational Psychology as being "an authoritative source" in the area of building E.E.O. defensibility into tests and personnel systems (APA; Division 14 Publication on Conducting and Evaluating Continuing Education Workshops, 2019). In terms of serving the public sector in developing legally defensible selection systems, we know of no other firm that can match our record. In our 44 years of providing protective service assessment work, our assessment procedures have been successful in demonstrating that our tests are valid and fair to all candidates regardless of race, ethnicity, or gender while emphasizing merit-based principles. Our proposal is based on the same principles that are found in our program that federal judges have accepted as valid and nondiscriminatory for example the one determined by the Federal Court (Morrow v. Ingram, Civil Action No. 4716(G), 2004 U.S. Dist., S.D. Ms. Sept. 17, 2004). Please see Appendix D for the Settlement and Agreement Order.

Assessment Philosophy

An in-depth understanding of our clients and their environment is our goal. This approach allows us to provide more effective personnel assistance. Our emphasis is not limited to developing and conducting valid assessment procedures. It includes establishment of sound procedures and consistent methodologies and is based upon an examination of the underlying rationale of the system and the needs it serves.

This "business approach" places emphasis on timely involvement of the principals in all aspects of the project. We recognize the importance of open and timely communication between personnel psychologists and their clients. We will make every effort to be responsive to your requests for special engagements and, where appropriate, at your request we will actively participate in various management and committee meetings related to this project.

The Team of Professionals

The principals, associates, and staff who will serve you have extensive experience and expertise in conducting this type of project. The team we have assembled to meet your needs is unmatched both in extensive professional experience and professional training. The resumes of these individuals are included in this proposal in Appendix E.



Erik Lawson
City of Stamford, Purchasing Manager
December 7, 2020
Page 3

In the final analysis, the credentials, experience and reputation that we describe and offer in this response package uniquely qualify Morris & McDaniel for your project. We believe, however, that excellence in service is based on more than just the talents of the individuals and the resources of their firm; it is dependent on the interest and enthusiasm which they commit to serve the needs of the client. We are prepared to provide this interest in full measure.

Sincerely,

David M. Morris, Ph.D., J.D.

David M. Morris, Ph.D., J.D.
President

DMM/gsga
Enclosures



TABLE OF CONTENTS

EXECUTIVE SUMMARY	8
A. BACKGROUND OF MORRIS & MCDANIEL	12
Description of the Organization.....	12
Project Management and Staffing Plan.....	15
Personnel Background and Qualifications	15
Our Professional Staff	16
Project Organization Table	17
Project Organization Chart	18
Staff Biographies	18
B. LIST OF ENTRY-LEVEL AND PROMOTIONAL EXAM PROJECTS	27
C. CLIENT REFERENCES	30
D. SERVICES PROVIDED	35
Typical Exam Components.....	35
Proposed Services – Work Plan	36
Entry-Level Testing	36
1. Project Planning/Discussions	36
2. Conduct a Transportability Study.....	36
3. Recommend Entry-Level Exam	37
4. Administer Entry-Level Exam	39
5. Scores.....	39
6. Final List Submitted to the City	40
7. Provisions for Testimony	40
Integrity of Exams	40
Promotional Testing	41
1. Participate in Project Planning Session.....	41
2. Review Existing Job Analysis Data and Relevant Literature	41
3. Conduct a Job Analysis for the Tested Ranks.....	41
4. Recommend Promotional Process for the Tested Ranks.....	46
5. Develop and Draft the Examination Plan Including Component Weights	46
6. Submit Draft Examination Plan to City Staff and Appropriate Decision-maker for Approval	47
7. Develop Draft List of Reading List Sources and Texts for the Appropriate Tested Ranks	47



TABLE OF CONTENTS (continued)

8. Develop Examination Schedule	47
9. Assist with Written Announcement.....	47
10. Develop and Conduct Candidate Orientation Sessions	47
11. Develop Written Test and Performance-Based Exercises for the Tested Ranks	49
12. Review by Approved Subject Matter Experts	51
13. Incorporate Changes and Develop Final Copy for Reproduction Purposes	51
14. Conduct the Administration and Scoring of the Written Examinations.....	51
15. Use Committee of Incumbents and Supervisors as SMEs to Establish Estimated Cut Off Scores	51
16. Analyze Test Results and Conduct all Appropriate Analysis for Adverse Impact....	51
17. Using a "Reality Test" Approach, Recommend Final Cut Off Score or Discuss Other Available Options with City Decision-Makers	53
18. Candidate Review and Appeal.....	53
19. Administer the Performance-Based Assessment Exercises.....	53
20. Assessor/Rater Training	54
21. Score Reports and Feedback	56
22. Assist with Grievance/Challenge.....	57
23. Present City with List of Eligibles for Each Tested Rank	57
24. Submit Technical Validation Report.....	57
25. Provisions for Testimony	58
Integrity of Exams	58
E. TIMELINES	59
F. COST.....	60
G. ADDITIONAL INFORMATION	62
Costs of Lawsuits	62
Security of Materials	62
Candidate Review and Appeal	62
Test Validation and Selection Assessment Expertise	63
Employee Selection Procedures.....	63
Job Analysis	63
Entry-Level Employee Selection, Promotion, and Placement	63
Assessment Centers	64
Examination Experience	64
Computer Capability	64
Legal and Regulatory Issues	65
Employment Discrimination Law.....	65
Insurance	65
Forms	65



TABLE OF CONTENTS (continued)

APPENDICES

RELEASE BY THE CITY OF NEW YORK.....	Appendix A
DCAS A+ RATING BY THE CITY OF NEW YORK.....	Appendix B
RESPONSE TO FLORIDA DEPARTMENT OF LAW ENFORCEMENT'S PROPOSED REMEDIAL MEASURES REGARDING LAW ENFORCEMENT BASIC ABILITIES PROFESSIONAL.....	Appendix C
ORDER BY JUDGE WALTER J. GEX, III, UNITED STATES DISTRICT COURT FOR THE SOUTHERN DIVISION, SEPTEMBER 21, 2004	Appendix D
MORRIS & MCDANIEL STAFF RESUMES.....	Appendix E
RECRUITING A DIVERSE FIREFIGHTING FORCE VIDEO	Appendix F
AKRON, OHIO LAWSUIT ARTICLE	Appendix G
VIDEO VS. LIVE - RESEARCH SUPPORTING	Appendix H
DEVELOPING A VALID AND CREDIBLE PROMOTION PROCESS	Appendix I
LEWIS VS. CITY OF CHICAGO DECISION	Appendix J



SHOULD YOU NEED ADAPTED PROMOTIONAL PROCEDURES THAT ADDRESS THE COVID-19 VIRUS

While Morris & McDaniel has responded to all elements of the RFP, we offer for your consideration, the option to provide the jurisdiction procedures that are responsive to the challenges that are presented by COVID-19. We have met this challenge with several jurisdictions and continue to work with all jurisdictions to adapt to their unique situation.

Each jurisdiction requires different solutions but there are common elements to the solutions. We stand ready to consult on these alternate procedures with the jurisdiction to explore ways to proceed with a process that might otherwise face cancellation or postponement. We will respond promptly to an email inquiry at contact@morrisandmcdaniel.com or by telephone at 703.836.3600.

We are facing rapidly changing circumstances that, for an unknown future, affect the ability to administer standard promotional processes that require gatherings of large numbers of candidates. Morris & McDaniel operates on the philosophy that the continued ability of public safety organizations to function effectively during these times is critical and that having the best leaders within those organizations is more vital than ever.

Delaying the necessary processes to select that leadership should be the last resort. With that in mind, we have developed successfully, alternate promotional processes that maintain the validity of the process while meeting, in all respects, the recommendations of CDC and other governmental advisory bodies intended to protect the safety of candidates themselves. Our procedures are designed to be flexible to allow adaptations to meet the unique situation of the particular client jurisdiction.



EXECUTIVE SUMMARY

Provide, administer, score and report results for the examinations and, as required for promotional exams, respond to appeals of exam questions.

Through a Request for Proposals (RFP# 814), Morris & McDaniel learned that decision-makers in the City of Stamford and the Stamford Police and Fire Departments are seeking outside assistance from qualified service providers to provide Entry Level and Promotional examinations. Specifically, the Consultant shall perform the following tasks, provide, administer, score and report results for the examinations and, as required for promotional exams, respond to appeals of exam questions. The test instruments to be designed and used must assess the necessary knowledge, skills, abilities and personal characteristics which are necessary for the job in question. Morris & McDaniel can accomplish these goals for the City and the Public Safety Departments. We offer valid, fair, and legally defensible protective service and public safety selection processes featuring components which will:

- provide a high degree of validity,
- have a direct job relationship,
- provide highly qualified candidates,
- minimize adverse impact and provide a diverse pool of candidates,
- supported by job analysis,
- assess the necessary knowledge, skills, abilities and other characteristics that are necessary for the job.

Ability to Provide Major Services of the Kind Requested

Morris & McDaniel is one of the most respected and experienced firms in the country in handling protective service and public safety assessment programs. We were by invitation, asked to assist the Houston Fire Department in resolving major litigation; and we were asked by invitation to assist numerous Police and Fire Departments in addressing costly legal issues. All clients who have followed our suggested procedures have successfully resolved or avoided litigious issues. We have been awarded the contract to provide testing services for several protective service positions, including fire and police positions for New York City. We have provided consulting services to numerous public safety departments, including Newport News Police and Fire Department, Houston Police Department, Prince William County Police Department, Jackson Police and Fire Departments (MS), Alexandria Police, Sheriff's, and Fire Departments, Durham Police Department, Fort Worth Police Department, Norfolk Police and Fire Departments, and College Park Police and Fire Departments. We were awarded New York City's protective service ranks including Police and Fire. We have recently received top ratings from our customers who completed a Past Performance Evaluation as part of the Open Ratings system sponsored by Dun and Bradstreet.

Our Firm's Professionals and Work Background

The principal partner of Morris & McDaniel, Dr. David Morris, holds a Ph.D. in Psychology with licensing in Industrial/Organizational Psychology as well as a Juris Doctorate in Law with professional experience in Title VII employment law. Dr. Morris will serve as Project Director. Principal partner Joe F. Nassar, who holds a master's degree in Public Administration and Bachelor of Science Degree in Criminal Justice, will serve as Project Coordinator. Roger McMillin, our Vice President of Operations, is retired Chief Judge for the Mississippi State Appeals Court. Professional staff who will be assigned to this project are well-qualified in similar professional experience and educational background.



The following proposal will outline our firm's qualifications and the professional services we can provide to address the Departments' assessment requirements as well as a detailed explanation of experience we possess to ensure professional capability in incorporating both job relatedness and validity. Having over 44 years of experience in developing, administering, and scoring entry-level testing and job-related, legally defensible promotional examinations for public safety positions, Morris & McDaniel is both knowledgeable and well-resourced in determining and fulfilling the testing needs of each individual client. Our emphasis on personal service as well as the "end-product" sets us apart from other large testing firms. In addition to our knowledge and background in testing, it is our commitment to serve our clients and the relationship we have with each one of them that makes us renowned in our field.

Outline of What Differentiates Morris & McDaniel from Other Firms Our firm has distinguished itself from other firms by its outstanding record in both creating legally defensible procedures. Often except in the most litigious of situations our procedures deter litigation.

- Morris & McDaniel was the firm invited without bid to come to Houston to address the costly lawsuits they were having. Morris & McDaniel is the first firm to be awarded all their police promotions in the history of the department and our contract has been renewed.
- Our firm was asked to come into New Haven, CT after the extremely polarizing lawsuit that went to the Supreme Court.
- Our firm was asked to come into Akron, OH after the litigation on their promotional procedures which they lost at a cost of almost 2 million dollars.
- Our firm was asked by Chief Richard Myers to assist Sanford, FL with their police promotions after their city was the unfortunate target of international attention as well as the attention of the DOJ.
- In addition to the above we have been asked to conduct police testing programs in some of the most dangerous environments such as Iraq where we had to develop creative solutions to a wide range of problems.

Based on our results we know of no other firm that can match our results and expertise.

Project Outline of Components

The entry-level and promotional testing processes recommended by Morris & McDaniel for the City's consideration include the following components listed below. Our proposal will detail the specifics of each component in the entry-level and promotional testing processes for both Police and Fire Departments. Our firm will also help with the written announcement, develop a candidate preparation guide, and conduct candidate orientation sessions.

The steps we propose for consideration for the entry level police and fire testing are:

- Planning Sessions
- Transportability Study
- Presenting Assessment Procedures for Consideration and Discussion
- Validation of Testing Components using Transportability procedures
- Multiple Choice Test
 - Entry-Level Fire or Police Exam – a score compensatory component assessing skills, abilities, and other characteristics (SAOs) related to the job.
 - These SAOs will be assessed in Part 1 and Part 2 of this component.
- A Structured Oral Process (SOP) – which assesses more complex dimensions, such as the ability to identify and analyze problems and the ability to communicate orally.



- Scoring of testing components and providing a list of Final Scores to the City.

Using the test presented above, our firm has been highly successful in achieving the same goals that the City of Stamford and the Stamford Police and Fire Department desire, for the Kansas City Fire Department, Newport News Fire Department, Memphis Fire Department, Philadelphia Police Department, and Mississippi Highway Patrol. We have never failed to achieve diversity and an exceptionally well qualified candidate pool to advance to the training academy.

The steps we propose for consideration for the promotional police and fire testing are:

1. Participate in Project Planning Session
2. Review Existing Job Analysis Data and Relevant Literature
3. Conduct a Job Analysis for Tested Ranks
4. Recommend Promotional Process for Each of the Tested Ranks
5. Develop and Draft the Examination Plan Including Component Weights
6. Submit Draft Examination Plan to City Staff and Appropriate Decision-Makers for Approval
7. Develop Draft List of Reading List Sources and Texts for the Appropriate Tested Ranks
8. Develop Examination Schedule
9. Assist with Announcement
10. Develop and Conduct Candidate Orientation Sessions
11. Develop Written Test and Performance-Based Assessment Exercises for the Tested Ranks
12. Review by Approved Subject Matter Experts
13. Incorporate Changes and Develop Final Copy for Reproduction Purposes
14. Conduct the Administration and Scoring of the Written Examinations
15. Use Committee Incumbents and Supervisors as SMEs to Establish Estimated Cut-off Scores
16. Analyze Test Results and Conduct all Appropriate Analysis for Adverse Impact
17. Using A "Reality Test" Approach Recommend Final Cut-Off Score or Discuss Other Available Options with City Decision-Makers
18. Candidate Review and Appeal
19. Administer the Performance-Based Assessment Exercises
20. Conduct Assessor/Rater Training
21. Score Reports and Feedback
22. Assist with Grievance/Challenge
23. Present City with List of Eligibles for Each Tested Rank
24. Submit Validation Technical Report



A. BACKGROUND OF MORRIS & MCDANIEL

A. State full name and address of your organization. Provide a brief review of your organization, including experience in entry level and promotional Police and Fire testing. Include biographical data and credentials of principals of your organization and of individuals who will provide, administer, and score the exams and respond to appeals of questions on the promotional exams for the City of Stamford.

DESCRIPTION OF THE ORGANIZATION

Morris & McDaniel was founded in 1976 and the company has been full-time in the business of Industrial and Organizational Psychology ever since including the development, scoring, administration, validation and defense of entry-level and promotional examinations for public safety occupations. In 2004, we opened our International Division, and for three (3) years, our firm assisted the U.S. Department of Defense in assessing police candidates for the Iraqi Civilian Police Force at testing centers in Baghdad, Erbil, Mosul, Sulaymaniyah, Al Kut, Al Hillah, and Basrah, and screening and translation of scoring procedures for the newly created National Iraqi Intelligence Agency (NIIA) in Baghdad.



Our experience includes a broad range of personnel management and personnel screening and vetting to local, state, and federal government agencies, as well as to private industry. Our organization provides research and consulting expertise that combines behavioral science principles with statistical analysis and a practical defensible approach that is tailored to meet the needs of our clients. Our staff is composed of experienced specialists with advanced degrees in the areas of industrial/organizational psychology, experimental psychology, public administration, and law, as well as expertise in data analysis and computer applications.

Our company has offices in the following cities:

- Washington, D.C. (Alexandria, Virginia);
- New Orleans, Louisiana;
- Memphis, Tennessee; and
- Jackson, Mississippi.

Our Washington, D.C. office will be the principal office servicing the City of Stamford project. As required by the RFP, the full name and address of our firm is provided below:

Morris & McDaniel, Inc.

David M. Morris, Ph.D., J.D., President

Address: 117 South Saint Asaph Street
Alexandria, VA 22314

Telephone: 703-836-3600

Fax: 703-836-4280

Email: contact@morrisandmcdaniel.com

Our first project as a corporate entity was an empirical content validation of entry-level tests used by a protective service organization. Based on our study, the lawyers for the plaintiffs elected not to challenge the testing process. Since that time, we have conducted a wide variety of human resource projects for public and private sector organizations including protective services and



public safety, with extensive experience in promotional testing in the fields of law enforcement, fire/EMS, and corrections.

Specifically, Morris & McDaniel, Inc. has provided consulting services to law enforcement organizations (including AMTRAK, Alexandria Virginia Sheriffs and Police Departments, Ann Arbor Michigan Police Department, Athens Georgia Police Department, Athens-Clark County Georgia Police Department, Boynton Beach Florida Police Department, Charlotte-Mecklenburg Police Department, Coconut Creek Florida Police Department, Chesapeake Virginia Police Department, College Park, Georgia Police Department, Dallas County Sheriff's Department, City of Dallas Texas Police Department, Decatur Georgia Police Department, Fort Collins Colorado Police Department, Fort Walton Beach Florida Police Department, Greenville South Carolina Police



Department, Hartford Connecticut Police Department, Houston Police Department, LaGrange Georgia Police Department, Leesburg Virginia Police Department, Lowell Massachusetts Police Department, Memphis Police Department, Mississippi Highway Patrol, Newport News Virginia Police Department, New York City Police Department, Norfolk Virginia Police Department, Portsmouth Virginia Police Department, Prince William County Virginia Police Department, Providence Rhode Island Police Department, Savannah Georgia Police Department, Shelby County Georgia Sheriff's Office, St. Mary's County Maryland Sheriff's and Corrections Offices, Stamford Connecticut Police Department, and University of Texas at Houston Police Department,); numerous fire departments (including Kansas City Fire Department, Memphis Fire Department, Norfolk VA Fire Department, Orange County Fire Rescue, Brevard County Fire Rescue Department, Palm Beach County Fire Rescue); airports (including Jackson International Airport Authority, Savannah Georgia Airport Police, Metropolitan Washington Airport Authority); hospitals (including Columbus Regional Hospital, Mississippi State Hospital, St. Francis Hospital); three legal departments (including the City of Philadelphia Legal Dept.); Civil Service Offices (including MS State Personnel Board, Massachusetts Department of Personnel Administration, Wyoming State Department of Personnel); educational institutions (including MS Dept. of Education, Palm Beach Community College, Santa Fe Community College); and private corporations (including Cargill Corporation, Canal Barge, Inc., Placid Refining Company, Saks, Inc., Wayne Farms, Inc.).

There are few firms that can match our depth of experience in developing valid, legally defensible, and fair tests for protective service and public safety organizations. We have developed combinations of written tests, performance-based assessment

In the last decade, we have not failed to achieve diversity for cities that have followed and implemented our suggested Police and Fire procedures.

centers, structured interviews, and training and experience ratings for numerous law enforcement, corrections, and fire departments in several states. We have conducted job analyses and have written law enforcement and fire promotion written knowledge tests for a variety of ranks. All these test items were written by our staff from materials which were identified in the job analysis as being relevant. Such materials included local general orders, special orders, rules and procedures, relevant sections of State and Federal laws, and relevant external textbooks.

We have developed tailor-made oral boards and assessment centers to meet the specific needs of numerous protective service and public safety organizations. The exercises for these assessment centers were developed entirely by our staff, based on information derived from our job analysis efforts. We also conducted each of these assessment centers, including training of



candidates, training of assessors, designing and managing the actual assessment process (candidates performing the exercises), managing the assessment council activities (assessors arriving at final scores), and providing written feedback to candidates.

In these fire and law enforcement assessment systems, we have assessed from 10 to 6,000 candidates at one time. In the case of the larger numbers, we have made extensive use of video-based assessment (use of video and audio equipment) for both presentation of practical exercise materials and recording of candidates' performance. We also have made use of innovative techniques such as multiple-choice in-basket and multiple-choice questions coupled with video vignettes. We believe in the use of video-based assessment which ensures a fair and valid process over live assessment procedures.

Morris & McDaniel, Inc. is considered by many to be the leading firm in the nation for solving diversity issues for large protective services (fire/EMS, law enforcement, and corrections) in their selection and promotional procedures.



Morris & McDaniel, Inc. was the "go to" firm for the Mississippi Highway Patrol, The City of Akron Fire Department, the Philadelphia Police Department, and the City of New Haven Fire Department, jurisdictions that have had diversity issues and long protracted litigation. Our assistance in these cases was by invitation, not by bid. Our reputation as the firm that "solves the problem," not the firm that "will try to address it," was earned by assisting many jurisdictions after several frustrating attempts on the clients' part with other vendors. Morris & McDaniel, Inc. was one

of only three testing firms allowed to conduct testing for Entry-Level Law Enforcement Officer and Correctional Officer for the Florida Department of Law Enforcement (i.e., for law enforcement and correction jurisdictions throughout the State of Florida). We have done projects in such diverse locations as New York, New York; Washington, D. C.; Norfolk, Virginia; Miami, Florida; Orange County, Florida; Austin, Texas; Kansas City, Missouri; and San Francisco, California. Some of our international projects include sites in Iraq and Uganda. In January 2015, Dr. Morris was asked to assist the World's newest democracy, South Sudan, in strengthening their police. South Sudan National Police Service (SSNPS) requested our assistance knowing that a stronger police was essential to strengthen their internal security. Dr. Morris and Tom Fuentes, VP of International Affairs, went to South Sudan and provided the newest scientific procedures to improve the selection and vetting of candidates for police officers for the South Sudan National Police Service (SSNPS). They assisted in screening and vetting all candidates for police officers.

Lastly, our work with the Mississippi Highway Patrol involving their entry-level selection procedures resulted in exceeding the parity goals established by the litigants during eight (8) separate successful administrations (2005, 2006, 2007, 2011, 2014, 2017, 2018, and 2019). The Federal Judge who reviewed our work that led to the end of one of the nation's longest running consent decrees actually wrote our procedures by name into the decree (see Appendix D). The Kansas City Fire Department was dealing with diversity issues and facing EEO scrutiny when they invited a proposal from our firm. That was in 2001, and today, our firm has handled every selection and promotional procedure for the ranks of Deputy Chief, Battalion Chief, and Fire Captain with no adverse impact. We remain under contract and this year our firm conducted the ninth entry-level selection process for the Kansas City Fire Department. In 2012 our firm developed and administered a selection process for the position of entry-level firefighter for the City of Rochester and the Rochester Fire Department. As indicated in the article "Recruiting a



Diverse Firefighting Force” (Appendix F), we were successful in achieving “the most diverse candidate pool in the history of the Rochester Fire Department.”

Morris & McDaniel has continued to demonstrate excellence to our clients in the successful development and administration of entry-level public safety projects.

We feel that our firm is unsurpassed in the development of valid, legally defensible, and fair promotional systems. Many of our promotional systems have been conducted in highly litigious situations. Most of our tests and assessments have been viewed by lawyers, as well as test candidates, as being so fair that there were no legal challenges.

Dr. Morris, Principal Project Leader, has been an expert witness in Federal Court on numerous occasions. With a few exceptions, these were Title VII cases. Dr. Morris, a Psychologist with licensing in Industrial/Organizational Psychology and an attorney, has been recognized by the profession of Industrial/Organizational Psychology as “an authoritative source in designing personnel systems which emphasize legal fairness and legal defensibility.” Dr. Morris is also a diplomat of the American Board of Psychological Specialties.

PROJECT MANAGEMENT AND STAFFING PLAN

Morris & McDaniel has an outstanding professional project team to support the City of Stamford and the Stamford Police and Fire Departments. The team is presented in the Table and Organizational Chart provided in this section. In this section, we provide preliminary descriptions of their expertise. Complete professional resumes are provided in Appendix E.

Personnel Background and Qualifications

Morris & McDaniel has an experienced and highly qualified staff of professionals and support personnel to conduct our projects. In this section we highlight the background and experience of our key professional staff who have participated in developing public safety promotional assessment systems including written examinations, assessment centers, oral boards and structured interviews. Dr. Morris and Mr. Nassar, as our firm’s principals, will be active participants in all project activities. Between them, they represent nearly eighty-seven (87) years of professional experience in conducting similar promotional assessments.

Dr. David Morris, the President of Morris & McDaniel, will serve as overall Project Director/Principal Project Leader. Mr. Joe Nassar, Vice President, will serve as Project Coordinator and Judge Roger McMillin, Vice President of Operations, will serve as Project Controller. Additional experienced project personnel include Dr. Lana Whitlow, Dr. Jeffrey Rain, Dr. Mark Mincy, Kim Anderson, Judith Thompson, Molly McDonald, Mayra Prado, Elizabeth Wood, Glenna S. Guidry Allen, and Adam Lester. Our project staff is highly experienced in Job Analysis procedures, written test and assessment center exercise development, administration, assessor training, and scoring procedures, as well as with using statistical computer programs to produce the statistical analyses and technical reports required by this project.



Our Professional Staff

Professional staff who will be assigned to this project are well-qualified in professional experience and educational background. Our project team will provide the quality of service that the City desires and are dedicated to working with the City on this most important assessment. The principals, associates, and staff who will serve you have extensive experience and expertise in conducting this type of project. Our project team will meet your needs and is unmatched both in extensive professional experience and professional training.

Principal partners of the firm, Dr. David Morris and Joe Nassar would have direct responsibility for fulfilling the terms of the contract. Dr. David Morris holds a Ph.D. in Psychology with licensing in Industrial/Organizational Psychology as well as a Juris Doctorate in Law with professional experience in Title VII employment law. Dr. Morris will serve as Project Director. Joe F. Nassar, who holds a master's degree in Public Administration and Bachelor of Science Degree in Criminal Justice, will serve as Project Coordinator.

Morris & McDaniel's project team includes many long-tenured staff members who are cross-trained on all aspects of the firm's work. Morris & McDaniel would have the ability to sustain the loss of key personnel and adapt to adequately meet the needs of the client and the terms of the contract efficiently and effectively.

Morris & McDaniel, Inc. has over forty-four (44) years of professional experience in providing the kind of services you have requested. The two principals, Dr. Morris and Mr. Nassar, have worked together for forty-three (43) of the forty-four (44) years our firm has been in business. Our professional staff possesses the education and professional experience, and corporate financial capabilities to successfully complete the City of Stamford's requested testing services.

Below we offer the biographical data and credentials of our principals and our highly qualified expert staff who will provide, administer, and score the exams and respond to appeals of questions on the promotional exams for the City of Stamford.

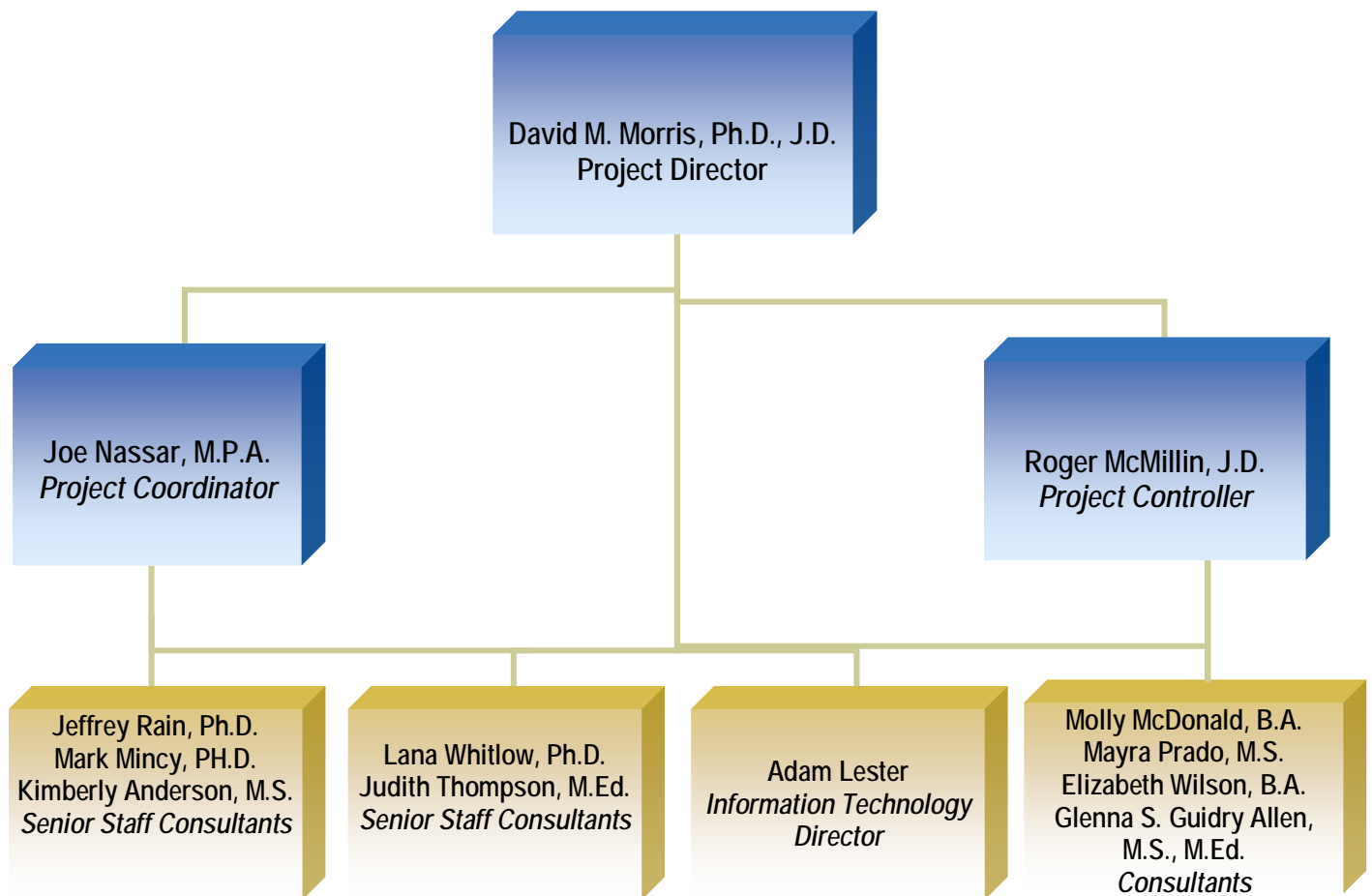


Organizational Table

Professional Staff	Individual Tasks
David M. Morris, Ph.D., J.D. Project Director and President	Responsible for the overall design of the examination plan; specific design and quality of the Job Analysis and the instruments used; design of the examination plan; design of the multiple choice test and performance-based exercises; candidate orientation; performance-based assessment administration; assessor training; monitoring scoring activities; overseeing any reports generated and providing legal assistance, as necessary.
Joe F. Nassar, M.P.A. Project Coordinator and Vice President	Responsible for ensuring that project elements are performed in a timely manner and coordinated with the appropriate City parties; assisting with job analyses; written test and performance-based assessment development and administration; assessor recruitment, assessor liaison, assessor training; and monitoring scoring activities.
Roger H. McMillin, J.D. Project Controller and Vice President of Operations	Responsible for overseeing contractual and legal issues; performance-based assessment administration; monitoring scoring activities; written test and performance-based assessment development and administration; assessor training; and monitoring scoring activities.
Lana Whitlow, Ph.D. Judith Thompson, M.Ed. Senior Staff Consultants	Assists with quality of test instruments and any reports generated.
Jeffrey Rain, Ph.D. Mark Mincy, Ph.D. Senior Staff Consultants	Assists with the job analysis; designing the logistics of the performance-based exercises, i.e., the sequence and timing of candidate and assessor events; overseeing development and administration of performance-based exercises; reviewing written tests and performance-based exercises; and conducting all statistical analyses.
Kimberly Anderson, M.S. Senior Staff Consultant	Collects data for the Job Analysis; developing announcements; development and finalization of written tests; development of performance-based exercises; component reviews with SMEs and incorporating changes; proctor written tests; assists with appeals; performance-based assessment administration; and score reporting.
Molly McDonald, B.A. Mayra Prado, M.S. Elizabeth Wood, B.A. Glenna S. Guidry Allen, M.S., M. Ed Staff Consultants	Reviews performance-based exercises; performance-based assessment administration; score reporting; and reports.



Organizational Chart



Staff Biographies

DAVID M. MORRIS, PH.D., J.D.

Dr. David M. Morris, President of Morris & McDaniel, Inc., has his Doctorate of Philosophy in Psychology, with licensing in Industrial/Organizational (I/O) Psychology, and his Juris Doctorate. Dr. Morris has held academic position and has taught courses in industrial and related areas of psychology. He has conducted psychological testing research for both public and private sector clients for over three decades. He has pioneered the development and use of innovative techniques and alternatives to traditional paper and pencil tests.

Dr. Morris' dual career as an I/O psychologist and attorney gives him a unique perception of Title VII and the development of personnel procedures. There are probably fewer than ten persons in the country licensed to practice both I/O psychology and law. His forte is building legal defensibility into the design of the personnel system.

In January 2015, Dr. Morris was asked to assist the World's newest democracy, South Sudan, in strengthening their police. South Sudan National Police Service (SSNPS) requested our assistance knowing that a stronger police was essential to strengthen their internal security. Dr. Morris and Tom Fuentes, VP of International Affairs, went to South Sudan and provided the newest scientific procedures to improve the examination and vetting of candidates for police



officers for the South Sudan National Police Service (SSNPS). They assisted in screening and vetting all candidates for police officers.

In 2007, Dr. Morris completed a project in Baghdad, Iraq, where he led a team at the Baghdad Police Academy, which implemented a screening test for potential candidates for the Iraqi Police Service (IPS). Dr. Morris developed and translated the American version of a highly successful entry-level police test into Arabic. This test is the National Police Test and tested over 70,000 Iraqi civilians. Successful test candidates enter the Police Academy for training.

In 1986, Dr. Morris was invited to give the annual Division 14 APA Seminar on the relationship of personnel selection and the law. Presenters of such seminars are by invitation only, and an invitation to conduct such training indicates the Society of Industrial/Organizational Psychology recognizes these individuals as having exceptional credentials in this area. The title of Dr. Morris' seminar was "Building EEO Legal Defensibility into Selection and Assessment Procedures."

Dr. Morris has served as Project Director for assessment centers used in the public as well as private sectors. These projects involved conducting job analyses and developing and administering written tests, assessment centers, oral boards, tactical exercises and structured interviews. Dr. Morris documented the required linkages to the job analysis results including appropriate weighting of performance dimensions. In many instances, because of the large number of candidates, innovations were used which included video-based situational exercises, multiple-choice formatted management exercises, and sometimes extensive use of video recordings to ease the administrative burdens associated with the use of assessors and large numbers of candidates.

Since 1976, Dr. Morris, as principal of the firm, has an extensive background in the development and administration of written test and performance-based assessment center procedures, assessor training sessions which includes monitoring of the scoring process, candidate orientation training sessions, Angoff procedures for setting cut-scores, developing and conducting a Second Review[®] Process (Appeal/Review) by test candidates, serving as an arbitrator for protective services, and expert witness research and testimony.

Dr. Morris is a member of many professional associations including the American Psychological Association, Division 14 of APA, the International Public Management Association – Human Resources, the IPMA Assessment Council, the American Bar Association, and the American College of Forensic Psychology.

He has delivered training programs on "How to Conduct a Job Analysis," "Avoiding EEO Litigation," "EEO Defense," "Performance Appraisals," and "Professional Designs and Legal Aspects of Performance Appraisals." He has made numerous presentations at professional conferences, including such topics as "EEO Guidelines and Psychological Testimony" and "Getting the EEO Lightning Rods Out of Your Personnel Practices." In 1987, Dr. Morris was selected by Management Europe (the European affiliate of the American Management Association) to present innovations in management assessment techniques at their annual personnel convention in Brussels, Belgium. The American Management Association asked Dr. Morris to give a presentation on personnel selection and the law at their 61st annual conference in April, 1990, in San Francisco. He was also invited to present a paper at the International Congress on Assessment Centers in Toronto in May of 1991 as well as in London, England in September 2006. Dr. Morris has been an invited speaker to the International Chiefs of Police (IACP) Conference on several occasions since 1986.



Dr. Morris founded the firm of Morris & McDaniel, Inc. and has been with the firm for over forty-four (44) years.

JOSEPH F. NASSAR, M.P.A.

Joseph F. Nassar, Vice President of Operations and Senior Staff Consultant of Morris & McDaniel, Inc., holds a Master of Public Administration and a Bachelor of Science in Criminal Justice and has completed course work toward his Ph.D. in Public Policy and Administration. Mr. Nassar has served as Assistant Project Director and Senior Staff Consultant on public and private sector projects. His professional work experience includes job analysis, job evaluation, job evaluation audits and interviews, development and administration of valid written knowledge tests (entry-level examination and promotional) and performance-based exercises for use in assessment center and oral board procedures, organizational/management analysis, and development and administration of training programs. Mr. Nassar has also conducted candidate orientation sessions for test candidates and worked with Subject Matter Experts (SMEs) in written test and performance-based assessment exercise development and editing for content and correct of test question or assessment exercises, written test and performance-based assessment administration, assessor training, monitoring of the scoring process by assessors, and conducting a Second Review® Process (Appeal/Review) by test candidates.

Mr. Nassar has professional experience in selection and promotional assessment procedures (job analysis, performance-based exercise development, administration, scoring, and monitoring) for jurisdictions and organizations, such as: Boston Police Department (written knowledge tests for the ranks of Captain, Lieutenant, Sergeant and Detective and assessment centers for the ranks of Captain, Lieutenant and Sergeant); San Antonio Police Department (written knowledge tests for the ranks of Captain, Lieutenant, Sergeant and Detective-Investigator and performance-based exercises for the ranks of Captain and Lieutenant); Massachusetts State Police (written knowledge tests and performance-based exercises for the ranks of Captain, Lieutenant and Sergeant); Norfolk Police Department (written knowledge tests for the ranks of Captain, Lieutenant, Sergeant and Corporal, and assessment centers for the ranks of Captain, Lieutenant, and Sergeant); U.S. Secret Service (assessment center process for the rank of Captain); Palm Beach County Sheriff's Department (written tests and assessment centers for the Law Enforcement and Correction ranks of Lieutenant and Sergeant); Philadelphia Police Department (written knowledge tests and structured oral board for entry-level police recruit candidates); Jacksonville Sheriff's Department (written tests and assessment centers for the ranks of Lieutenant and Sergeant); Kansas City Fire Department (written knowledge tests for the ranks of Battalion Fire Chief, Captain, Lieutenant, and Fire Apparatus Operator, assessment center for the rank of Battalion Fire Chief, and structured oral board for entry-level firefighter recruit candidates); Norfolk Fire Department (written tests and assessment centers for the ranks of Battalion Fire Chief, Fire Captain, and Fire Lieutenant); and Akron Fire Department (assessment centers for the ranks of Captain and Lieutenant and entry-level firefighter recruit candidates).

Mr. Nassar has been with the firm of Morris & McDaniel, Inc. for over forty-three (43) years.

ROGER H. MCMILLIN, JR., J.D.

Judge McMillin recently retired from his position as Chief Judge of the Court of Appeals of the State of Mississippi. Judge McMillin served on the Court of Appeals from 1995 until his retirement in April 2004. He served as Chief Judge for over half of his tenure on the Court. Judge McMillin joined the firm of Morris & McDaniel in May 2004 as General Counsel and Vice President for Operations.



From 2004-2007, Judge McMillin spent the majority of his time on the ground in Baghdad, Iraq, where he headed a team at the Baghdad Police Academy, which implemented a screening test for potential candidates for the Iraqi Police Service (IPS). Morris & McDaniel developed and translated the American version of its highly-successful tests into Arabic and submitted the translated version to a panel of experts to verify translation accuracy and to probe the tests for cultural or social concerns that had to be addressed before the test was administered. Over 70,000 Iraqi civilians have been tested using our firm's test instrument. Successful test candidates enter the Police Academy for training.

As Chief Judge of the Court of Appeals, Judge McMillin gained invaluable experience in administering large and complex operations where the timely achievements of were critical to the success of the organization. As Chief Operations Officer for the Police Screening Project, Judge McMillin will be able to utilize his administrative skills to see that the various aspects of the project remain on track and that all critical deadlines are met.

LANA PRUDHOMME WHITLOW, PH.D.

Dr. Whitlow, Vice-President and Lead Psychometrician, holds a Doctorate of Philosophy in Psychology from Southern California University for Professional Studies. She obtained a Master of Science degree in Counseling Psychology, with concentration in psychometrics, from the University of Southern Mississippi and received her Bachelor of Science degree in Psychology at Louisiana State University. While at LSU, Dr. Whitlow assisted senior professors in research, data collection and statistics. Her graduate work included an assistantship to a tenured professor requiring undergraduate teaching, research for the Department of Psychology chairman, data analysis as well as psychometrics. Dr. Whitlow's doctoral dissertation was an original study of the application of an independent work ethic dimension to the success rate within law enforcement personnel. She holds membership in the Academic Honor Societies of Gamma Beta Phi and Psi Chi and is a professional member of American Psychological Association and Louisiana Psychological Association.

Dr. Whitlow's responsibilities for Morris & McDaniel, Inc., are diverse. While she heads the Marketing Division, Dr. Whitlow also conducts all psychological screening of police applicants for our clients in the Greater New Orleans area as well as all executive management assessments for our private New Orleans area clientele. Dr. Whitlow has extensive experience in interviewing and testing and has served as an expert witness for law enforcement testing for selection.

Prior to joining Morris & McDaniel, Inc., Dr. Whitlow held the position as primary psychometrician for two psychological practices as well as neuropsychological assessor for several New Orleans hospitals.

Dr. Whitlow has been with Morris & McDaniel, Inc., since 1990.

JEFFREY RAIN, PH.D.

Dr. Rain has worked with Morris & McDaniel for over 28 years including several testing projects for numerous protective services. He has extensive experience conducting job analysis and developing exercises. He has conducted job analysis for over 28 years for many protective services. Dr. Rain received his undergraduate degree in Psychology from The Citadel, Charleston, South Carolina, and his PH. D in Industrial/Organizational Psychology from Louisiana State University.



MARK D. MINCY, PH.D.

Mr. Mark Mincy, Senior Staff Consultant of Morris & McDaniel, Inc., has a master's degree in Industrial/Organizational (I/O) Psychology from the University of Arkansas at Little Rock and he holds a Bachelor of Science degree in Psychology with a minor in General Science from the University of Central Arkansas. He has his PhD in Industrial/Organizational Psychology from the University of Southern Mississippi. He holds memberships in the Society for Industrial and Organizational Psychology, American Society for Training and Development, International Society for Performance Improvement, American Psychological Association, Society for Human Resource Management, Psi Chi (National Honor Society in Psychology), and the Deming Institute for Quality.

Prior to joining Morris & McDaniel, Inc., Mr. Mincy worked as a Consultant for the Center for Applied Organizational Studies where he assisted in the development of a person-organization fit instrument to be used in employee selection, conducted various job analyses, developed, analyzed, and made improvements to administrative as well as developmental performance appraisal systems (360-degree feedback system), developed, conducted, statistically analyzed, and presented results from organizational surveys for organizations ranging in size from 10 to 10,000 employees. He also assisted in the development of several training programs in both the public and private sector.

While at USM and UALR, Mr. Mincy assisted senior professors in research and data collection. His graduate work included teaching undergraduate courses such as Statistics, Ethics, and Introductory Psychology. In addition, it included diverse research projects involving employee attitude surveys, personality studies, and developing various survey instruments.

Since joining he has become involved with developing competency models, the development of employee examination tests for use in China, and the development and validation of various Entry-Level and promotional tests and performance-based assessment exercises for such jurisdictions as the Kansas City Fire Department, Boston Police Department, Palm Beach Sheriff's Office, Jacksonville Sheriff's Office, and the City of Norfolk, Virginia. Mr. Mincy has considerable experience conducting candidate orientation sessions, working with the SMEs in the development and review of written test and performance-based exercises, written test and performance-based assessment administration, conducting assessor training and monitoring of the scoring process by assessors, and conducting a Second Review® Process (Appeal/Review) by test candidates.

KIMBERLY N. ANDERSON, M.S.

Kimberly Anderson, Senior Staff Consultant of Morris & McDaniel, Inc., holds a Master of Science degree in Counseling Psychology with an emphasis in Psychometrics and a Bachelor of Arts degree in Journalism with an emphasis in Public Relations and minors in English and Psychology.

During her tenure at Morris & McDaniel, Ms. Anderson has worked with numerous police departments, fire departments, sheriff's offices, and correctional facilities. To date, Ms. Anderson has conducted job analyses for over 800 public sector job titles and specializes in working with subject matter experts in job observations and test and exercise review meetings. Ms. Anderson has administered written tests and performance-based assessment exercises for police, fire, sheriff, and correction organizations, conducted assessor training, and monitored scoring procedures by assessors. Over the past few years, she has worked with clients such as Kansas City, Missouri Fire Department, the State of New Jersey, Memphis Fire Department, Norfolk Fire Department, Metropolitan Nashville Police Department, San Antonio Police Department, Jacksonville Police Department, Palm Beach County Sheriff's Department, Orange County Fire Rescue, Austin Police Department, and the United States Park Police.



Ms. Anderson has also served in a training capacity for our private sector clients. Currently, she participates in Morris & McDaniel's International Police Assessment Screening Committee (I.P.A.S.). The mission of the committee is to seek out and identify contacts in likely markets for our police testing services that have been successfully used by the Iraqi Police Service.

While at Morris & McDaniel, Inc., Ms. Anderson has participated in other special projects such as organizational and validation studies.

Ms. Anderson has been with Morris & McDaniel, Inc., since 2000.

JUDITH THOMPSON, M.ED.

Judith Thompson, Senior Staff Consultant and Licensed Psychometrist holds a Master of Education in Psychometry and a Bachelor of Science degree in Elementary Education with areas of concentration in Diagnostic Reading and Fine Arts. Ms. Thompson has done educational testing and consulting and has taught courses in related areas of psychology. She holds membership in the National Association of Psychometrists.

While at Morris & McDaniel, Ms. Thompson has worked with numerous police departments, fire departments, sheriff's offices, correctional facilities, state departments, as well as private sector clients. Ms. Thompson has participated in all phases of test and exercise development for both entry-level and promotional processes, including job analysis; test and exercise construction, review, and administration; assessor training and scoring of assessment center exercises; and validation and technical report writing for clients.

Ms. Thompson has participated in a Validation Study for the San Antonio Police Department; job analysis study development and validation of written test and assessment exercises for the ranks of Battalion Chief, Captain and Lieutenant for the Kansas City, Missouri, Fire Department; Law Enforcement and Correction Lieutenant and Sergeant for the Palm Beach County Sheriff's Office; Sergeant and Captain for the United States Park Police; Detective, Captain, Lieutenant for the San Antonio Police Department; Fire Battalion Chief, Captain, and Lieutenant for the Norfolk Fire Department; and various other clients. Ms. Thompson has also participated in a number of organizational studies including clients such as Mississippi Department of Human Services and San Antonio Police Department. Ms. Thompson also conducts statistical analyses of data and writes technical reports for clients. Ms. Thompson also conducts psychological evaluations for the Jackson, MS Airport Authority, Bastrop, Louisiana Police Department, and Memphis Fire and Police Departments.

Ms. Thompson has been with Morris & McDaniel, Inc., since 2000.

MOLLY C. McDONALD, B.A.

Molly McDonald, Personnel Analyst of Morris & McDaniel, Inc. holds a Bachelor of Arts degree in Political Science with a minor in English.

Ms. McDonald served as assistant project manager of the Mississippi State Personnel Board Quality Workforce Initiative Project, conducting job analyses for over 500 public sector jobs. In addition to conducting job analyses through technical conferences, this project involved developing competency models for state employees, updating and validating state job descriptions for ADA and EEOC compliance, and writing technical validation reports.



Ms. McDonald is currently in charge of several aspects of the Criminal Justice Basic Abilities certification tests for Law Enforcement and Correctional Officers for the Florida Department of Law Enforcement. She supervises the production of all testing materials; maintains all electronic records pertaining to the contract; participates in data compilation and organization for statistical reports; maintains good business relationships with clients; and ensures compliance with contract requirements.

While at Morris and McDaniel, Inc., Ms. McDonald has participated in the areas of job analysis, validity, and competency development. Ms. McDonald has also participated in the development, administration, and scoring of entry-level and written, knowledge-based exams for several government agencies and private sector organizations, as well as in the development and administration of performance-based assessments for various police and fire departments. In the past, she has worked with clients such as Winston-Salem Police Department, Kansas City Fire Department, Norfolk Police Department, Norfolk Fire and Rescue, Memphis Fire Department, Palm Beach County Fire-Rescue and Sheriff's Office, Metropolitan Nashville Police Department, University of Texas at Houston Police Department, Orange County Fire Rescue, Tucson Police Department, and Mississippi Highway Patrol.

Ms. McDonald has been with Morris & McDaniel, Inc. since 2003.

MAYRA PRADO, M.S.

Mayra Prado, Staff Consultant of Morris & McDaniel, Inc., holds a Master of Science degree in Psychology with an emphasis in Industrial and Organizational Psychology. She also has a Bachelor of Science degree in Accounting with a minor in Business.

While at Morris & McDaniel, Inc., Ms. Prado has participated in the review of testing instruments and development and scoring of performance-based assessment exercises and written knowledge-based tests for police and fire organizations. In addition, Ms. Prado has conducted numerous job analyses and participated in administration and scoring of assessment centers for various police and fire departments. Ms. Prado has also supervised scoring procedures such as compiling and verifying data, creating feedback reports and final lists for several police and fire departments. In the past, she has worked with clients such as Rochester Fire Department, Houston Fire Department, Memphis Fire Department, Jackson Fire Department, Norfolk Police and Fire Departments, Newport News Police and Fire Departments, New Haven Fire Department, Pennsylvania State Police, Richmond Police Department, Maryland-National Capital Park Police, Jefferson Parish Sheriff's Office, Austin Police Department, San Antonio Police Department, and Jackson Police Department.

While at Morris & McDaniel, Inc. Ms. Prado has participated in other special projects such as an organizational study for a large Department.

Ms. Prado has been with Morris & McDaniel, Inc., since 2009.

ELIZABETH WILSON, B.A.

Elizabeth Wilson, Staff Consultant of Morris & McDaniel, Inc. holds a Bachelor of Arts degree in Biology with a dual Bachelor of Arts degree in Psychology.

While at Morris & McDaniel, Inc. Ms. Wilson has participated in the areas of job analysis, validity, and competency development. She has spent time working with subject matter experts in job observations and written test and assessment center exercise development and review meetings. Ms. Wilson has also participated in the administration of written knowledge-based tests and



assessment centers for police and fire organizations across the country. She has worked with clients such as Jackson Fire Department, Orange County Fire Rescue Department, Houston Fire and Police Department, University of Texas Police Department at Houston, New Haven Fire Department, Richmond Police Department, Maryland Park Police, Austin Police Department, Colorado Springs Police Department, Norfolk Police Department, Norfolk Fire Rescue Department, Kansas City Fire Department, District of Columbia Fire and EMS Department, Atlanta Fire Department, and the Mississippi Highway Patrol.

Ms. Wilson has been with Morris & McDaniel, Inc. since 2010.

GLENNA S. GUIDRY ALLEN, M.S., M.ED

Glenna Guidry Allen, Staff Consultant of Morris & McDaniel, Inc., holds a Master of Education in Counseling & Personnel Services, and Master of Science in Sports Administration with a concentration in Sports Psychology and a Bachelor of Science degree in Psychology. While at the University of Southern Mississippi she assisted senior professors in research and data collection. Her graduate work included teaching undergraduate courses such as Introductory Psychology, Sport Psychology, and Human Performance. She holds memberships in Association for Talent Development and Mississippi Chapter Association of Talent Development, SHRM, and APMP.

While at Morris and McDaniel, Inc., Ms. Guidry Allen has spent time working with subject matter experts in the areas of job analysis and in multiple phases for the development of written multiple-choice tests and assessment center exercises. She has worked with clients such as Atlanta Fire Department, Austin Fire Department, Chesapeake Fire, College Park Fire Department, Colorado Springs Police Department, Durham Police Department, Hartford Fire Department, Houston Police Department, Irving Police and Fire Departments, Kansas City Fire Department, Memphis Fire Department, New Haven Police and Fire Departments, Newport News Police and Fire Departments, Norfolk Police and Fire Departments, Portsmouth Police and Fire Departments, Stamford Police and Fire, and Shelby County Sheriff's Office and Fire Department. Ms. Guidry Allen also writes proposals and Job Analysis reports.

Ms. Guidry Allen has been with Morris & McDaniel, Inc. since 2014

ADAM LESTER

Mr. Adam Lester, Information Technology Director, leads IT strategic and operational planning to achieve business goals by fostering innovation, prioritizing IT initiatives and coordinating the evaluation, deployment and management of current and future IT systems across our organization. He also specializes in information systems security and provides proper safeguarding of classified and sensitive information and equipment. His expertise also includes web development and database management.

Prior to joining Morris & McDaniel, Mr. Adam Lester worked in conjunction with the U.S. Department of Homeland Security to secure the McCoy Federal Building, U.S. Federal Courthouse and several Internal Revenue Service and Social Security Administration offices located across Mississippi. He assisted in the implementation of technology and security improvements to one of the Defense Department's most powerful supercomputer centers, located at Stennis Space Center, Mississippi. Also, at Stennis Space Center, he worked with NASA to upgrade fiber-optic infrastructure to connect a server farm to other southeastern locations such as Keesler Air Force base. He worked with the Naval Meteorology and Oceanography Command to provide technology and security improvements to the NAVOCEANO War fighting support center as well.



In late 2000, Mr. Lester assisted in the re-engineering of MCI WorldCom's data network. This consisted of various technology improvements and additions to their headquarters located in Clinton, MS.

Mr. Lester managed a project to upgrade voice and data systems for the City of Jackson Emergency Communications Center and also made vast improvements to the data network of The City of Oxford. The City of Oxford project drastically improved communications between City hall, the Fire Department, the Police Department, and Public Works.

Over his 13 years of experience, Mr. Lester has also provided consulting, design, project management, and support services to large corporations including Eaton Aerospace, Nissan, Dell, Wal-Mart, and Target.



B. LIST OF ENTRY-LEVEL AND PROMOTIONAL EXAM PROJECTS

B. List of all public safety entry level and promotional exam projects you have undertaken or completed in the past 5 years including: (1) name of jurisdiction, (2) name of job title(s) involved, (3) year(s) of exam project, (4) impact on protected classes (in terms of B-W effect size, that is the standardized difference between means or, if that is not available, the adverse impact in terms of appointments or, if that is not available, the adverse impact in terms of passing rates, if available), and (5) any legal challenge(s) to the project and resolution (if applicable). (You may, but are not required, to list promotional exam projects that go back more than 5 years.)

As a licensed professional psychologist, our professional regulations and all of the states I am licensed in prevent me from providing information on other clients. I can say that our record of creating diversity in all of our lists is unmatched. Unlike our approach, many jurisdictions are only able to achieve diversity by lowering the cut score. So if their assessment process is valid and predictive of how well the candidates will do in the target rank, it is clear that unlike our approach, which has diversity at the top of the list, the only way those jurisdictions can achieve diversity with the process that they were given is by lowering the quality of those on the list or by reducing the cut score. We use a multi-metric approach designed to yield the best candidates, with diversity at the top of the list.

Morris & McDaniel has over forty-four (44) years of extensive experience developing entry-level and promotional selection systems for Public Safety Departments, both nationally and internationally. While we are glad to provide as much information as we can that would be useful in evaluating our qualifications to perform the duties of the RFP, and we can say we have had no adverse impact in our entry-level fire selection process, our firm deems certain of the requested information regarding results from similar work for other jurisdictions to be proprietary to our clients, and as licensed professionals, we are bound by rules and ethics that prevent us from providing. Test results and the impact of results on protected classes delve into very sensitive issues and even have legal ramifications for our clients. To share that sort of data with third parties would violate our obligation of confidentiality to our existing clients unless they were prepared to give a waiver. However, the waiver request could put our clients in an awkward position, and we have elected to refrain from placing any client in that situation. We can say without equivocation that in the over 44 years our company has been in this field, there has never been a successful legal challenge to any of our selection or promotional processes based on claims of adverse impact on any protected class. However, we hope the following information will be sufficient for your request.

A representative sample of statistical information is presented in Table 1. That said, should the City of Stamford's RFP review process desire additional information, we would be happy to discuss the matter further.

Standardized Mean Difference (SMD)

The Standardized Mean Differences (SMDs) are presented in Table 1. To make meaningful interpretations of group mean differences, comparisons must be made using a common scale. SMDs allow direct comparisons of the size of the difference between two groups' mean scores because they are expressed in a standardized metric (i.e., standard deviation units). While the SMDs from other jurisdictions (or other vendors) provide generalizable information concerning the potential impact if those assessments were administered for Stamford, the SMDs from Morris & McDaniel's processes as previously conducted for Stamford represent "local" data. Local data demonstrate Morris & McDaniel's processes as a proven practice that reduces adverse impact on protected groups. As such, findings do not have to be generalized or transported to Stamford.



We therefore list our local data SMD results from Stamford first, followed by SMDs from a representative sample of jurisdictions using our proposed processes. For comparison purposes, the jurisdiction's staff size (FF / PO) and service population (POP) are provided.

The sample size (N) is the total number of all candidates who tested at the specified job title or rank. The standardized mean difference (SMD) values below were derived from Cohen's d statistic and were calculated for protected groups representing at least two percent of the tested population. An asterisk next an SMD value indicates the difference was statistically significant. For comparison purposes, general cognitive ability assessments frequently yield SMD values of 1.50 (Roth, Bevier, Bobko, Switzer, & Tyler, 2001; Sackett & Shen, 2010; Schmitt & Mills, 2001). Generally, SMD values greater than 2.00 are statistically significant; however, when group sample size is small (<30), larger SMDs may not be statistically significant and their larger value should be considered as having no practical impact.

We make special note of the fact that in the below table none of the SMDs greater than 2.00 are not statistically significant, with one exception ($d = 3.71$, orange shaded) which indicates that the difference favored Female candidates.

Table 2.
Standardize Mean Difference (SMD) Results by Jurisdiction, Year, and Job Title/ Rank.

Jurisdiction <i>Job title/ Rank</i>	Project Years	N	Asian/ White	Afr. Am./ White	Hispanic/ White	Female/ Male
Stamford, CT FF = 262 / PO = 287 POP = 120,000						
<i>Fire, Captain</i>	2020	TBD	TBD	TBD	TBD	TBD
<i>Fire, Lieutenant</i>	2020	TBD	TBD	TBD	TBD	TBD
<i>Police, Sergeant</i>	2019	45	1.45	-0.96	-0.35	0.07
<i>Police, Entry-Level</i>	2019	573	-0.61	0.03	-0.13	-0.10
<i>Fire, Fire Marshal</i>	2018	5	N/A	0.01	N/A	N/A
<i>Fire, Deputy Fire Marshal</i>	2018	6	N/A	N/A	N/A	N/A
<i>Fire, Assistant Fire Marshal</i>	2018	4	N/A	N/A	N/A	N/A
<i>Fire, Entry-Level</i>	2018/9	844	0.01	-0.02	-0.13	0.31
<i>Fire, Deputy Fire Chief</i>	2017	13	N/A	N/A	N/A	N/A
<i>Fire, Captain</i>	2017	24	N/A	0.29	N/A	N/A
<i>Fire, Lieutenant</i>	2017	38	N/A	-0.92	N/A	N/A
<i>Police, Captain</i>	2017	5	N/A	N/A	N/A	N/A
<i>Police, Lieutenant</i>	2017	14	N/A	-0.62	N/A	N/A
<i>Police, Entry-Level</i>	2016/7	458	-0.06	-0.22	-0.35	-0.18
<i>Fire, Entry-Level</i>	2015	378	0.03	0.25	-0.13	0.05
Austin FF = 1, 182 / PO = 1,900 POP = 885,000						
<i>Fire, Division Chief</i>	2020	5	N/A	N/A	N/A	N/A



Jurisdiction Job title/ Rank	Project Years	N	Asian/ White	Afr. Am./ White	Hispanic/ White	Female/ Male
<i>Fire, Battalion Chief</i>	2019	12	N/A	-1.83	-3.80	2.67
<i>Fire, Captain</i>	2019	43	N/A	0.77	-0.38	0.53
<i>Fire, Lieutenant</i>	2019	24	0.40	-1.01	0.81	-0.38
<i>Fire, Specialist</i>	2019	200	2.13	-0.55	-0.30	0.32
<i>Fire, Entry-Level</i>	2019	1676	-0.12	-0.29	-0.30	0.05
<i>Fire, Captain</i>	2017	42	N/A	2.68	0.00	1.42
<i>Fire, Entry-Level</i>	2017	1158	-0.05	-0.31	-0.14	-0.03
<i>Fire, Battalion Chief</i>	2016	10	N/A	N/A	-2.11	-1.02
<i>Fire, Entry-Level</i>	2015	1576	-0.59	-0.23	-0.17	0.09
<i>Fire, Entry-Level</i>	2013	2008	0.00	-0.20	-0.26	0.01
<i>Police, Lieutenant</i>	2012	49	N/A	-0.07	-0.10	0.14
<i>Police, Lieutenant</i>	2010	27	N/A	-0.89	0.38	-0.64
<i>Police, Sergeant</i>	2010	81	-0.46	0.01	-0.16	0.07
Hartford, CT						
FF = 354 / PO = 406						
POP = 120,000						
<i>Police, Sergeant</i>	2019	65	-0.15	-0.19	-0.30	-0.15
<i>Police, Entry-Level</i>	2019	267	-0.58	-0.41	-0.36	0.21
<i>Police, Captain</i>	2018	9	N/A	-4.24	0.57	0.64
<i>Police, Lieutenant</i>	2018	25	N/A	-0.34	-2.55	-2.16
<i>Fire, Battalion Chief</i>						
<i>Fire, Captain (Trng.)</i>	2019	4	N/A	-0.35	N/A	-0.92
<i>Fire, Captain (Sppr.)</i>	2019	17	N/A	0.13	0.03	-0.44
<i>Fire, Captain (Prev.)</i>	2018	6	N/A	-0.07	0.14	-0.14
<i>Fire, Driver (Pumper)</i>	2018	9	N/A	-0.37	N/A	0.04
<i>Fire, Driver (Aerial)</i>	2018	7	N/A	0.30	N/A	3.27
<i>Fire, Driver (Chief's Aide)</i>	2018	8	N/A	0.92	N/A	0.27
<i>Fire, Lieutenant</i>	2018	47	N/A	-0.53	-0.50	-0.14
<i>Fire, Lieutenant (Trng.)</i>	2018	18	N/A	-0.59	-0.29	-0.02
<i>Fire, Lieutenant (Prev.)</i>	2017	31	N/A	-0.73	-0.15	-0.24
<i>Fire, Deputy Chief (Trng.)</i>	2016	4	N/A	N/A	0.03	N/A
<i>Fire, Entry-Level</i>	2016	595	0.06	-1.26	-0.93	-0.04
Norfolk, VA						



Jurisdiction Job title/ Rank	Project Years	N	Asian/ White	Afr. Am./ White	Hispanic/ White	Female/ Male
FF = 490 / PO = 768 POP = 870,000						
<i>Fire, Battalion Chief</i>	2019	14	N/A	N/A	N/A	1.98
<i>Fire, Captain</i>	2019	13	N/A	-2.39	N/A	2.76
<i>Fire, Lieutenant</i>	2019	69	-0.72	-0.06	0.79	-0.96
<i>Police, Captain</i>	2018	9	N/A	1.20	N/A	3.60
<i>Police, Lieutenant</i>	2018	18	N/A	0.01	0.37	1.01
<i>Police, Sergeant</i>	2018	27	-0.44	0.10	-1.22	3.71
<i>Police, Corporal</i>	2018	65	-0.91	0.17	-0.06	1.67
<i>Fire, Battalion Chief</i>	2016	13	N/A	1.75	N/A	-2.36
<i>Fire, Captain</i>	2016	17	N/A	-0.26	N/A	0.70
<i>Fire, Lieutenant</i>	2016	65	N/A	-1.43	-0.16	0.61
<i>Police, Captain</i>	2014	9	N/A	0.96	N/A	N/A
<i>Police, Lieutenant</i>	2014	29	N/A	-0.09	N/A	0.37
<i>Police, Corporal</i>	2014	92	-1.10	0.32	-0.19	0.13

N indicates the total number of candidates. SMD (Standardized Mean Difference) is expressed as Cohen's *d* statistic.

Please feel free to call any of our clients and ask about our diverse results.



C. CLIENT REFERENCES

C. Names and contact information for 5 references who are familiar with your entry level and promotional examination work and whom the City may contact.

CLIENT REFERENCES AND PROFESSIONAL EXPERIENCE IN PROVIDING SIMILAR CONSULTING SERVICES

Morris & McDaniel, Inc. has over forty-four (44) years of extensive experience in developing promotional and entry-level systems for Public Safety Departments, both nationally and internationally. We have included references for projects similar in size and scope below including the name and address of the organization, type of contract, name, title, address, and telephone number of the contract contact person, contract years, scope of services and numbers of candidates tested.

We claim as confidential by virtue of being a “trade secret” as defined by the following information:

The list of client references that includes jurisdiction, identification, contact person, and prior work history with the jurisdiction. The rationale being that this amounts to a detailed and highly informative customer list of our company.

Note: Morris & McDaniel does not wish to disclose our firm’s protective service clients outside the scope of the proposal review by the proposal decision-makers in the City of Stamford, Connecticut and the Police and Fire Departments.

The information in this section is proprietary and confidential - Pages 30-34.

NEWPORT NEWS POLICE DEPARTMENT, NEWPORT NEWS, VIRGINIA

Contact: Captain Stuart Bradley, cell 757-570-8951, work 757-928-4163

bradleysb@nnva.gov

Services provided from 2009 – Present:

Police Chief & Assistant Chief – developed and administered written executive in-basket exercises and performance-based assessment exercises.

Police Captain Police Lieutenant & Police Sergeant – conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises, and provided development, administration, and on-site monitoring of PHP.

Master Police Officer – conducted job analyses. Developed and administered performance-based assessment exercise.

Entry-Level Police Officer – developed and administered police officer selection process, entry-level law enforcement examination, CPS, and structured oral process.

NEW HAVEN POLICE DEPARTMENT, NEW HAVEN, CONNECTICUT

Contact: Stephen Librandi, Manager of Human Resources and Benefits, work 203-946-6767

slibrandi@newhavenct.gov

Services provided from 2010 – Present:

Entry-Level Police Officer – conducted a police officer selection process, developed and administered an entry-level law enforcement examination, CPS, and structured oral process.

Police Lieutenant, & Police Sergeant – conducted job analyses. Developed and administered written knowledge examinations, and performance-based assessment exercises.



Deputy Chief & Assistant Chief – conducted job analyses. Developed and administered performance-based assessment exercises.

PRINCE WILLIAM COUNTY POLICE DEPARTMENT, PRINCE WILLIAM COUNTY, VIRGINIA

Contact: Assistant Police Chief Kevin Hughart, work 703-792-7247, cell 571-238-2673
khughart@pwcgov.org

Services provided from 2013 – Present:

Lieutenant, First Sergeant, & Sergeant – conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises, and evaluation of professional history portfolio.

NORFOLK POLICE DEPARTMENT, NORFOLK, VIRGINIA

Contact: Deputy City Manager and Former Chief of Police, Michael Goldsmith, 757-664-4242

Michael.goldsmith@norfolk.gov

Services provided from 2005 – Present:

Police Corporal, Police Sergeant, Police Lieutenant, & Police Captain – conducted job analyses. Developed and administered written knowledge examinations, and performance-based assessment exercises.

RICHMOND POLICE DEPARTMENT, RICHMOND, VIRGINIA

Contact: Antoinette H. Tull, Human Resources Director, PHR, SHRM-CP, HRPM; work 804-646-6126, cell 804-363-5877

antoinette.tull@richmondgov.com

Services provided from 2011 – Present:

Police Captain, Police Lieutenant, & Police Sergeant – conducted job analyses. developed and administered written knowledge examinations, and performance-based assessment exercises.

AUSTIN POLICE DEPARTMENT, AUSTIN, TEXAS

Contact: Barry Cook, Civil Service Director, 512-974-3312

barry.cook@texas.gov

Services provided from 2003 – 2015:

Police Sergeant, Police Lieutenant, & Police Commander – conducted job analyses. Developed and administered general knowledge tests and performance-based exercises.

HOUSTON POLICE DEPARTMENT, HOUSTON, TEXAS

Contact: Retired Assistant Chief Mark L. Curran, 713-301-2212

marklcurran@aol.com

Services provided from 2012 – 2015

Police Captain – conducted job analysis. Developed and administered written knowledge examination and performance-based assessment center.

Police Lieutenant & Police Sergeant – conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment centers and USERRA military make-ups.

AUSTIN FIRE DEPARTMENT, AUSTIN, TEXAS

Contact: Barry Cook, Civil Service Director, 512-974-3312,
barry.cook@texas.gov

Services Provided from 2013 - Present:

Battalion Chief – Job Analyses and knowledge examinations



Fire Captain – Job Analyses and knowledge examinations
Fire Lieutenant – Job Analyses and knowledge examinations
Fire Specialist – Job Analyses and knowledge examinations
Entry-Level Firefighter – Transportability Study, Entry-Level Firefighter Examination, Candidate Profile Summary for Firefighters, and Structured Oral Process

JACKSON FIRE DEPARTMENT, JACKSON, MISSISSIPPI

Contact: Fire Chief Willie Owens, cell 601 212 2825, wowens@jacksonms.gov

Services Provided from 2011 - Present:

Battalion Chief - Job Analyses, knowledge examinations, and performance-based exercises

Fire Captain - Job Analyses, knowledge examinations, and performance-based exercises

Fire Lieutenant - Job Analyses, knowledge examinations, and performance-based exercises

Fire Specialist - Job Analyses, knowledge examinations, and performance-based exercises

Engineer (Driver) – Job Analyses and practical exercises (driving and practical components)

PRINCE GEORGE’S COUNTY FIRE/EMS DEPARTMENT, PRINCE GEORGE’S COUNTY, MARYLAND

Contact: Fire Chief Tiffany Green, 301 883 5200, tdgreen@co.pg.md.us

Services Provided from 2019 to Present:

Conducted job analyses, written knowledge examinations, and performance-based assessment exercises for the ranks of **Fire Lt./EMS Lt.**, **Fire Captain/EMS Captain**, **Paramedic Lt.**, **Fire Technician**, and **Paramedic Battalion Chief**.

NEW HAVEN FIRE DEPARTMENT, NEW HAVEN, CONNECTICUT

Contact: Stephen Librandi, Manager of Human Resources and Benefits, 203-946-6767, slibrandi@newhavenct.gov

Services Provided from 2011 - Present:

Assistant Fire Chief – Job Analyses, written examinations and performance-based assessment exercises

Battalion Chief – Job Analyses, written examinations and performance-based assessment exercises

Deputy Fire Chief – Job Analyses, written examinations and performance-based assessment exercises

Deputy Fire Marshal – Job Analyses, written examinations and performance-based assessment exercises

Director of Training – Job Analyses, written examinations and performance-based assessment exercises

EMS Supervisor – Job Analyses, written examinations and performance-based assessment exercises

Entry-Level Firefighter (Physical Abilities Testing) – Job Analyses, written knowledge examinations and performance-based assessment exercises

Fire Captain – Written examinations and performance-based assessment exercises

Fire Inspector/Investigator – Job Analyses, written examinations and performance-based assessment exercises

Fire Lieutenant – Job Analyses, written examinations and performance-based assessment exercises

Fire Marshal – Job Analyses, written examinations and performance-based assessment exercises

Firefighter Paramedic – Job Analyses, written examinations and performance-based assessment exercises



Life Safety Compliance Officer – Job Analyses, written examinations and performance-based assessment exercises

Public Assembly Inspector – Job Analyses, written examinations and performance-based assessment exercises

Fire Investigative Supervisor – Job Analyses, written examinations and performance-based assessment exercises

WATERBURY FIRE DEPARTMENT, WATERBURY, CONNECTICUT

Contact: Scott Morgan, Human Resources/Civil Service Director, 203 574 6761, smorgan@waterburyct.org

Services Provided from 2019 to Present:

Conducted job analyses, written knowledge examinations and performance-based assessment exercises for the ranks of **Battalion Chief** and **Fire Captain**.

Conducted job analyses and performance-based assessment exercises for the ranks of **Fire Chief** and **Deputy Fire Chief**.

OXNARD FIRE RESCUE DEPARTMENT

Contacts: Fire Chief Alex Hamilton, work 805 385 7722, cell: 805-513-3012 alexander.hamilton@oxnard.org

Services Provided from 2017 – Present:

Entry-Level Firefighter (Physical Abilities Testing) – Job Analyses, written knowledge examinations and performance-based assessment exercises

Fire Captain - Conducted job analysis, developed, administered, and scored a written examination and a performance-based assessment exercise.

Fire Battalion Chief - Conducted job analysis, developed, administered, and scored a written examination and a performance-based assessment exercise.

HARTFORD FIRE DEPARTMENT, HARTFORD CONNECTICUT

Contact: Thulani LeGrier, Director of Human Resources, 860 757 9806 or 860 757 9500, Thulani.LeGrier@hartford.gov

Services Provided from 2010 to Present:

Conducted job analyses, written knowledge examinations, and performance-based assessment exercises for the ranks of **Fire Lieutenant**, **Fire Captain**, **Fire Prevention Chief**, **Deputy Chief**, and **Assistant Chief**.

Conducted job analysis/transportability study **Entry-Level Firefighter** test, candidate profile summary for firefighters, structured oral process, and physical abilities testing for the rank of Entry-Level Firefighter and **Fire Driver**.

CHESAPEAKE FIRE DEPARTMENT, CHESAPEAKE, VIRGINIA

Contact: Fire Chief Ed Elliott, work 757- 382-6947, eelliott@cityofchesapeake.net

Services Provided from 2010 - Present:

Battalion Fire Chief – Job Analyses, knowledge examinations and performance-based assessment exercises

Fire Captain – Job Analyses, knowledge examinations and performance-based assessment exercises

Fire Lieutenant – Job Analyses, knowledge examinations and performance-based assessment exercises

Our information claimed as proprietary and confidential ends here.



D. SERVICES PROVIDED

D. Outline of suggested possible components of the entry level and promotional Police and Fire exams and information on adherence to all required laws and professional practices concerning exam validity, reliability, and adverse impact.

The City of Stamford, Connecticut, is seeking a qualified service provider to develop and administer entry-level and promotional exams for both the Police Department and Fire Department. Morris & McDaniel can accomplish these goals for the City of Stamford as our firm is the premier firm for providing these services in a legally defensible manner. We offer valid, fair, and legally defensible written exams and assessment processes featuring components which will:

- provide a high degree of validity,
- have a direct job relationship,
- provide highly qualified candidates,
- minimize adverse impact and provide a diverse pool of candidates,
- supported by job analysis,
- assess the necessary knowledge, skills, abilities and other characteristics that are necessary for the job.

Morris & McDaniel stands ready to perform the tasks, and meet the requirements, outlined in the RFP.

Typical Exam Components

The development of written job knowledge tests or test of cognitive ability is guided by the principles of psychometrics. Specifically, we follow the principles of the AERA, APA, NCME Standards for Educational and Psychological Testing and the Principles for the Validation and Use of Personnel Selection Procedures of the Society of Industrial and Organizational Psychology (Division 14 of the American Psychological Association, 2018). For performance-based exercises such as written exercises, oral presentation exercises, tabletop exercise simulations, we follow the Guidelines and Ethical Considerations for Assessment Center Operations endorsed by the 28th International Congress on Assessment Center Methods (2015). The entry-level and promotional selection processes for the Stamford Public Safety Departments will be developed and conducted in such a manner as to conform to both professional standards and governmental guidelines.

Our goal is to develop valid and legally defensible selection procedures for the Stamford Police and Fire Departments. We shall design entry-level and promotional selection procedures that are:

- **Legally Defensible**, giving deference to the requirements of the Uniform Guidelines on Employee Selection Procedures and the requirements of the Harford Protective Service Department and Civil Service Commission rules, regulations, and union contracts, where applicable.
- **Professionally Defensible**, giving deference to the requirements of the professional psychological standards, specifically the Society of Industrial and Organizational Psychology (Division 14) Principles for the Validation and Use of Personnel Selection Procedures: Fifth Edition and the AERA, APA, NCME Standards for Educational and Psychological Tests.
- **Reliable**, demonstrating high consistency in results and freedom from random error.
- **Job Related and Valid**, using job analysis for knowledge, skill, and ability (KSAs) identification, knowledge source identification, linking sources to KSAs and to tasks,



deriving performance standards and management dimensions, and developing professional quality tests, and assessment exercises.

- **Fair**, providing everyone with a clear perception of equal opportunity to compete on the basis of their relative qualifications for entry-level and promotional selection opportunities.
- **Efficient**, being easy to administer and capable of accommodating the number of candidates for these positions.
- **Administratively Feasible** in terms of the development and long-term human and fiscal compatibility with the time frames and operational cycles for the establishment of certified lists of eligibles for each position.

We claim as confidential by virtue of being a “trade secret” as defined by the following information:

The portion of our proposal that sets out the Proposed Methodology we would use to accomplish the objectives set out in the RFP. The rationale in that the description of our methodology is beyond question a compilation of information used in our business that was uniquely developed by our company and which provides a business advantage over those who do not know it; it also being a process or procedure used by our company “irrespective of novelty.”

Note: Morris & McDaniel, Inc. does not wish to disclose our methodology outside the scope of the proposal review by the proposal decision-makers in City of Stamford and the Stamford Police and Fire Departments.

The information in this section is proprietary and confidential - Pages 36-58.

PROPOSED SERVICES – WORK PLAN

The following information provides an outline of the Entry Level and Promotional testing services that our firm proposes for the City's consideration.

Entry-Level Testing

1. Project Planning/Discussions

Within the first five days following the award of the project, the project team leaders of Morris & McDaniel will discuss the project plan with the City and the Police and Fire representatives. The purpose of the discussions will be to:

- a. collect relevant material (e.g., information regarding the position);
- b. identify all staff (City and Consultant) who will be involved in or affected by the project, and plan to include those individuals in the information gathering and information flow process;
- c. obtain reactions to the proposed methodology; and
- d. consider options for meeting selection procedure goals and determine the agency's preferences.

Based upon these preliminary discussions, our project team will refine a comprehensive work plan describing all tasks and subtasks for the project and designating all personnel (City and Consultant) to each activity. This detailing of the work plan will help clarify the roles and timelines of all those involved. This will help ensure the timely completion of all project phases and anticipate potential problems.

2. Conduct a Transportability Study

Validity Transportability is a formal professional procedure supported by Section 7B of the



Uniform Guidelines which allows evidence of validity gathered from one location to be “transported” to another location. Our validation studies for both the Fire and Police testing procedures have substantial evidence of validity and comply with legal and professional standards. See Appendix D for Federal Judge’s order (*Morrow v. Ingram*, Civil Action No. 4716(G), 2004 U.S. Dist., S.D. Ms. Sept. 17, 2004).

S.O.S. 1. Consultant will review job analysis data in determining the comprehensive range of aptitudes, skills, abilities and other traits that will identify candidates best suited to perform successfully in the position. Consultant shall be guided by the results of the job analysis process in developing all products and services.

Review the Job Analysis Data and Assemble the Exam Plan

Per the RFP, Morris & McDaniel will review job analysis data to determine if further data collection is necessary and implement procedures for collection of said data. We will use this data in determining the comprehensive range of aptitudes, skills, abilities, and other traits that will identify candidates best suited to perform successfully in the position. As with all our assessment procedures, Morris & McDaniel always follows the most appropriate validation strategy set forth from those in the Uniform Guidelines and the Principles for Validation. Per the RFP, and as with all our examinations, we will develop the exam based upon the results of the Job Analysis. We believe the final decision in terms of the components in the examination plan should be made after the job analysis study has been reviewed and the transportability study has been conducted and in collaboration with decision makers in the City and Human Resources Department.

3. Recommend Entry-Level Exam Components

Subject to discussions with the City’s decision makers and confirmation by the Transportability Study and Job Analysis Study and based on prior experience, the following Entry-Level Selection process may be considered. Based on the RFP, the City of Stamford is seeking valid and legally defensible employment selection processes for the entry-level positions of Police Officer and Firefighter. Contingent on Job analysis support, we would like the City to consider the following components. These components have been very successful for other clients.

A. Entry Level Test for Fire or Police –

Part 1: assessing abilities such as spatial orientation, mechanical reasoning, mathematical reasoning, and verbal reasoning. The test will not have a cut score, but will be weighted.

Part 2: assessing other abilities, personal characteristics, and qualities that are important and relevant to the job such as teamwork, cooperation, work style/work ethic, reasoning, judgment, and the ability to comply with important work requirements. We recommend that the test not have a cut score but be weighted according to the job analysis and decided in consensus with the Department, the City, and other decision makers agreed upon in planning sessions conducted at project initiation.

Morris & McDaniel has excellent tests validated for assessing these abilities relevant and directly related to the firefighter and police officer jobs. They have been used successfully along with other assessment instruments to create valid lists achieving outstanding diversity. The validity of these tests meets or exceeds the Department of Labor validation coefficients for the “Very Beneficial” category.



Once the tests are determined, through the Job Analysis and the Transportability Study, to be valid and directly related to the appropriate Entry-Level position in the Stamford Police or Fire Departments, the tests will be administered. These tests can be offered as pencil versions or on-line form.

B. Structured Oral Process (SOP) -

The job analysis will be used to assess the relationship to the entry-level position in Stamford through appropriate linkages and/or the Transportability Study.

All candidates are presented situations with questions and the candidates' responses are video recorded. In this way, a large number of candidates can be captured on video without security risk.

Later, trained raters score the candidates' performance of job-related dimensions, as determined or confirmed through the Job Analysis and Transportability Study, such as problem identification and analysis, decision making, interpersonal skills, and oral communication skills, etc.

In previous projects, we developed and administered entry-level interview procedures that resulted in no adverse impact. We believe that the process is technique sensitive in that the training of the raters and the standardized process developed for evaluation and scoring were critical factors in achieving the goal of no adverse impact.

S.O.S. 6. In the use of a proposed oral exam, Consultant will seek, secure and train assessors in conducting and scoring the exam. Diversity within the assessor group in terms of race, age, gender and ethnicity will be required.

We will provide system, technology, and support and will be responsible for the administration and scoring of the Structured Oral Process. Members of our professional staff will conduct the video recording, training of the raters, and monitor the scoring activities. Per the RFP, we will seek, secure, and train assessors in conducting and scoring the exam. We will seek diversity in terms of race, age, gender, and ethnicity.

S.O.S. 6 Consultant must also provide orientation/training of the assessors. In an effort to mitigate the chances of assessor-to-candidate familiarity, Consultant is expected to recruit and provide assessors search. Consultant will be responsible for providing travel and all other expenses for assessors and should budget this item in the bid/proposal accordingly.

Morris & McDaniel will also provide orientation/training of the assessors as per the RFP. To mitigate the chances of assessor –to-candidate familiarity, we will recruit and provide the assessors search. We will ensure it is budgeted for within the bid/proposal accordingly. We acknowledge that we will be responsible for providing travel and all other expenses.



S.O.S. 5. Consultant will provide any and all materials, written or otherwise, associated with any and all products or services recommended as components appropriate for use in the selection process. This may include, but not necessarily be limited to, printing of any and all exam materials, including answer sheets, with all appropriate security provided preventing unauthorized persons from having access; exam administration of any and all recommended components, instructions to candidates, all necessary supplies, supervision, distribution and collections of all exam materials and appropriate number of test monitors/proctors. Any and all examination components will be conducted on date(s) and time(s) agreed upon by Human Resources and the Consultant. Human Resources will be responsible for securing all necessary test sites.

4. Administer Entry-Level Exam

Morris & McDaniel will be responsible for administering the exam as required; and/or will provide any and all materials, written or otherwise, associated with any and all products or services recommended as components appropriate for use in the selection process. This may include, but not necessarily be limited to printing of any and all exam materials, including answer sheets, with all appropriate security provided preventing unauthorized persons from having access; exam administration of any and all recommended components, instructions to candidates, all necessary supplies, supervision, distribution, and collections of all exam materials and appropriate number of test monitors/proctors. Any and all examination components will be conducted on date(s) and time(s) agreed upon by Human Resources and Morris & McDaniel.

Other Information 4. The City will send notice to candidates concerning when and where to appear to take the exam, based on direction from the consultant.

Per the RFP, the City of Stamford's Human Resources will secure all necessary testing sites and will send notice to candidates concerning when and where to appear to take the exam based on direction from Morris & McDaniel. Personnel administering the exam will be assisted on the proper procedures for each step and will be given a Test Administrator's Manual.

S.O.S. 4. Consultant shall develop and provide appropriate candidate preparation resources and materials relative to all testing components of the selection process.

Morris & McDaniel will develop and provide appropriate candidate preparation resources and materials relative to all testing components of the selection process.

S.O.S. 8. When the results conclude from a small number of cases, Consultant shall use the most appropriate statistical procedure to analyze results for adverse impact.

5. Scores

Morris & McDaniel will be responsible for the scoring of the entry-level test. Morris & McDaniel will provide the Human Resources department a final list of test scores within 48 hours of receipt of completed exams at our scoring center. Morris & McDaniel will analyze any all test components using scoring methodologies appropriate to each component and which reduce subgroup differences of each component used. We will also include a demographic analysis and a review for adverse impact following the 80% Rule of the Federal Guidelines for each component used. As per the RFP, when the results conclude from a small number of cases, Morris & McDaniel will use the most appropriate statistical procedure to analyze results for adverse impact.



S.O.S. 10b. Consultant must also certify the accuracy of all submitted results by certifying to their accuracy in writing.

6. Final List Submitted to the City

A Final List is based on all assessments; the weights of assessments will be determined by the Job Analysis and the validation procedures. Per the RFP, we will certify in writing the accuracy of all submitted results by certifying to their accuracy in writing.

10. Consultant must be prepared to defend all rendered test services and products in the event of a legal challenge. Consultant must also certify the accuracy of all submitted results by certifying to their accuracy in writing. Other Information 3. Consultant is required to maintain all files concerning the test for 5 years or until the completion of any legal challenges, should there be any.

7. Provisions for Expert Testimony

Dr. David M. Morris, President of Morris & McDaniel, has been an expert witness in Federal Court on numerous occasions. With a few exceptions, these were Title VII cases. Dr. Morris is a Psychologist with licensing in Industrial/Organizational Psychology and an attorney who has been recognized by the profession of Industrial/Organizational Psychology as an authoritative source in designing personnel systems which emphasize legal fairness and legal defensibility. Dr. Morris will be available for expert testimony should this need develop. We will represent the City as an expert witness in all court proceedings and grievances throughout the process against all claims regarding the testing and assessment procedures. We will be prepared, if necessary, to provide expert testimony before governing bodies, in a civil service hearing or in a court of law. Any required testimony shall be considered a part of the pricing Agreement resulting from the overall contract. Per the RFP, we will maintain all files concerning the test for five (5) years or until the completion of any and all legal challenges, should there be any.

Integrity of Exams

Overexposure can happen if the frequency of exam administration is high enough, in which case certain steps are taken to assure a parallel exam. There are numerous procedures that can be used to mitigate this, such as, randomly changing the order of the questions, modifying the stem, and changing the order of the choices. In addition, multiple parallel tests have been used successfully in jurisdictions where the test is given over multiple years which successfully addressed the issue of overexposure of the exam.

S.O.S. 9. Based on method proposed by Consultant for an examination review process, Consultant shall provide whatever materials are necessary for the City to conduct a review at the conclusion of the examination process.

Per the RFP, Morris & McDaniel will provide whatever materials are necessary for the City to conduct a review at the conclusion of the examination process.



Promotional Testing

1. Participate in Project Planning Session

Within the first five days following the award of the project, the project team of Morris & McDaniel will discuss the project proposal with the City, Police Department, and Fire Department project members and decision-makers. The purpose of these discussions will be to:

- a. become acquainted with the organizational structure and management philosophy of the City and Public Safety Departments in regard to a new promotional process through discussions and collection of relevant material (e.g., information regarding the positions);
- b. identify all staff who will be involved in or affected by the project, and plan to include those individuals in the information gathering and information flow process;
- c. discuss with the City and Public Safety Departments project management staff and obtain reactions to the proposed methodology; and
- d. discuss options for meeting selection procedure goals and determine the City's preferences.

Based upon these preliminary discussions, our project team will refine a comprehensive work plan describing all tasks and subtasks for the project and designating all personnel (City, Public Safety Departments and Contractor) to each activity. This detailing of the work plan will help clarify the roles of all those involved. This will help ensure the timely completion of all project phases and anticipate potential problems.

S.O.S. 1. Consultant will review job analysis data in determining the comprehensive range of aptitudes, skills, abilities and other traits that will identify candidates best suited to perform successfully in the position. Consultant will then determine if further data collection is necessary and implement procedures for collection of said data. The consultant will be required to follow the most appropriate validation strategy from those set forth in the Uniform Guidelines and the Principles for Validation.

2. Review Existing Job Analysis Data and Relevant Literature

Morris & McDaniel staff will review existing job analysis data, job descriptions, job content questionnaires, and any training materials for the jobs. Sources outside of the organization will also be reviewed, including Morris & McDaniel's extensive library on these positions. Our firm will use this information in determining the comprehensive range of aptitudes, skills, abilities and other traits that will identify candidates best suited to perform successfully in the position. We will then determine if further data collection is necessary and implement procedures for collection of said data. Our firm will follow the most appropriate validation strategy from those set forth in the Uniform Guidelines and the Principles for Validation.

3. Conduct a Job Analysis for Tested Ranks

Our approach to job analysis is strategic. In the words of Stephen Covey, "we begin with the end in mind." We know that we have two objectives. We want to customize exercises and other assessments to reflect real world scenarios and, thus, we want to maximize our understanding of the work, the work context, performance standards of excellence, and competency requirements. The second objective is to collect the data that meets professional psychological standards and governmental regulatory requirements. We must gather sufficient information to meet the specific provisions of those psychological standards and the Uniform Guidelines on Employee Selection Procedures. Dr. Morris is a recognized expert in job analysis and has been recognized as an expert in Federal



Courts. Morris & McDaniel uses a Technical Conference of Subject Matter Experts; that has proven to be extremely effective in maximizing the quality of job analytic data for police, fire, sheriffs and corrections offices while minimizing the amount of time off the job for these important public safety professionals.

With our vast depth of expertise and experience in the field of job analysis, the Morris & McDaniel team is well-equipped to assist the Department in addressing all critical issues. Ratings on whether something is “needed at entry” are necessary to make this determination. As an example, when creating real world scenarios for performance-based exercises (performance-based exercises, oral presentations, tabletop exercise simulations), it is helpful to gather positive and negative critical incidents from Subject Matter Experts. Certain job analysis procedures and methods are more appropriate for a given promotional system. Further, sufficient biographical information must be gathered for the Subject Matter Experts to document their level of expertise.

The Morris & McDaniel team follows the requirements for job analysis in the Uniform Guidelines on Employee Selection Procedures and their associated Questions and Answers. The major requirements for job analysis in government guidelines include:

- Any method of job analysis may be used (Sect. 14A)
- Full job analysis is required for content validity (Q & A 58)
- Complete task analysis is not necessary (Q & A 77)
- Emphasis should be on observable work behaviors and work products (Q&A 77)
- Identification of critical or important work behaviors is required (Q&A 77)
- Linkage of items to work behaviors is required (Q&A 79)
- Linkage of items to level of difficulty of knowledge used in work behavior is required (Q&A79)
- For content validity (Section 14C)
 - Operational definitions of skills, knowledge, abilities are necessary (Sect. 14C(1), and (4) and Q&A 75)
 - Important work behaviors and associated tasks must be identified (Section 14C(2))
 - Identification of work products is required (Section 14C(2))
 - Emphasis on observable work behaviors (Section 14C(2))
 - Critical work behaviors must be identified (Section 14C(2))
 - Should not involve KSAs learned on the job in a brief orientation period (Section 14C(1) and Q&A 74)
 - Description of the work situation is required (Section 15C(3))
 - Complexity and difficulty of KSA as used in the work behavior must be defined (Section 15C(3))
 - Requirements for approximation of selection procedure and work behaviors (Q&A 62, Q&A 73, Q&A 78)
 - Specific requirements for document of validity evidence in report (Section 15)
 -

While there are legal and regulatory requirements for job analysis, for a system to be valid and defensible, it must meet the requirements of professional psychological standards.

The psychological profession involved in employment testing has issued a set of standards to assist employers, including municipal governments, in developing and



implementing job-related procedures. This document is the Principles for the Validation and Use of Personnel Selection Procedures: Fifth Edition (2018) published by the Society of Industrial and Organizational Psychology (Division 14) of APA.

Some of the major requirements for content valid procedures contained in the Division 14 Principles are:

1. The job analysis methodology must provide data on the job content.
2. The job analysis must identify the important and frequent content domains of the job.
3. The content domains may be determined by pooled judgments of incumbents, supervisors or personnel specialists.

It is a complex task to develop job-related procedures that meet professional psychological requirements. However, research has shown that valid selection procedures, developed by appropriate job analysis techniques, contribute to organizational productivity (Hunter & Schmidt, 1982; Schmidt, Hunter, McKenzie & Muldrow, 1979), while simultaneously permitting employers to meet their equal employment opportunity obligations.

From the above discussion, it should be clear that the job analysis supporting promotional procedures occurs within a complex context of legal/regulatory and professional requirements. Department officials should select a consultant who has a clear understanding of these multi-faceted requirements to establish a legally and professionally defensible promotional process that will be fair and equitable to all candidates.

Review Existing Job Analysis Data and Relevant Literature

All prior job analysis studies, including the ones that are our firm conducted, relevant information related to tasks and activities required for the positions of tested and any training materials will be carefully reviewed. Sources outside of the organization, including our firm's library, will be accessed. Any other information deemed appropriate by Morris & McDaniel's professional staff for review will be included in this step.

Onsite Job Observations and Interview Sessions with Incumbents

Experienced job analysts with our firm will conduct one-on-one interviews and job observations (ride-alongs) with the Public Safety Department job incumbents and/or supervisors of the tested ranks to further understand job duties and responsibilities for each rank. Diverse representations with respect to race and gender for these job observations will be sought.

Develop a Preliminary List of Task Behaviors & KSAs

After reviewing all the data relevant to the tested positions, i.e., any previous job analysis, job descriptions, training manuals, our firm's extensive files on these protective service positions, and task inventories from other jurisdictions, job analysts from our firm will build a comprehensive draft list of tasks which could be performed by persons in the targeted ranks. Each task will contain a brief description of a specific activity which could be performed. For ease of administration and discussion, tasks will be rationally grouped into clusters of common or related duties within each job. A list of possible knowledges, skills, and abilities (KSAs) will also be developed for each tested rank. This material will be reviewed for race, gender, and cross-cultural sensitive issues. Diverse representation with respect to race and gender in these committees will be sought.



Have Incumbents & Supervisors Review Preliminary List of Tasks and KSAs

A small committee of incumbents and supervisors will review the list of tasks and KSAs to make sure that all important elements for both categories of tasks and KSAs have been included. Diverse representation with respect to race and gender in these committees will be sought.

Develop a Rating Scale to go with the Task Inventory

Typically the courts and the profession wish to see the following ratings of tasks: (1) relative importance of the tasks, (2) frequency. An appropriate biographical checklist will be used. All of this data will be in the instrument and reviewed in the above step. The KSAS will be rated on 1) importance; 2) how long does it take to become proficient; 3) necessary at entry or first day on the job; and 4) ability to distinguish superior from the average performer. The KSAS will be linked to the work duties.

Develop Sampling Plan

The number of individuals to be surveyed using the task inventory will be determined according to Table 1 (adapted from Drauden, G.M., and Peterson, N.G., 1977), or from Table 2, "Fact Finding Techniques and Job Analysis Costs" taken from "Using Job Analysis to Design Selection Procedures," by Rouleau and Krain, Public Personnel Management, 1975.

TABLE 1		
TOTAL NUMBER OF PERSONS IN CLASS (POPULATION SIZE)	NUMBER OF PERSONS TO BE SURVEYED (SAMPLE SIZE)	
	n	%
50 or less	all	100
50 to 100	50 - 60	50+
100 to 200	50 - 100	25+
200 or more	100 or more	25+

Race and gender representation will be important, and those selected for ratings will be brought together as a group and instructed in the rating task.

These task rating sessions take about four (4) hours. KSAS linking and rating sessions require four (4) to six (6) hours. Both the task inventory rating and the KSAS linking and rating are further discussed in the following sections.



Fact Finding Techniques & Job Analysis Costs - Table 2

Most Expensive ----- Least Expensive

No of Persons in class	Individual Interview	Observation Interview	Group Interview (4-6 pers)	Technical Conference (4-6 pers)	Diary* Method	Questionnaire Method	Check List
1 - 10	Interview All	50%	1 Session	1 Session	ALL	ALL	ALL
11 - 20	Interview Half	33%	1 - 2 Sessions	1 Session	50%	ALL	ALL
21 - 30	Interview Half	33%	1 - 2 Sessions	1 - 2 Sessions	50%	ALL	ALL
31 - 50	20%	25%	2 Sessions	2 Sessions	50%	75%	ALL
51 - 100	15%	25%	2 - 3 Sessions	2 Sessions	33%	50%	ALL
101 - 200	10%	20%	3 Sessions	2 - 3 Sessions	33%	50%	ALL
201 - Over	10%	10%	3 - 4 Sessions	3 Sessions	25%	25%	ALL

White Collar ----- Blue Collar

Rules of Thumb: - the smaller the class size the greater the possibility of heterogeneity of function within the class may combine several methods to fit circumstances of classification

*Diary Method is most appropriate where direct observation is not always possible (i.e., a nurse in a contagious disease ward).

FROM: "Using Job Analysis to Design Selection Procedures" by Eugene J. Rouleau and Barton F. Krain. Public Personnel Management, 1975, (4) 300-304 **Develop Sampling Plan**

The number of individuals to be surveyed using the task inventory will be determined according to Table 1 (adapted from Drauden, G.M., and Peterson, N.G., 1977), or from Table 2, "Fact Finding Techniques and Job analysis Costs" taken from "Using Job Analysis to Design Selection Procedures," by Rouleau and Krain, Public Personnel Management, 1975.

Field Test the Job/Task Analysis Instrument

The task inventory and the instructions will be field tested for clarity and accuracy. Appropriate changes will be made.

Administer the Task Inventory Using Technical Conference Method

Administration of the task inventory to incumbents and supervisors will be conducted under standardized conditions using the Technical Conference Method. The pilot test conducted in the prior stage will ensure that the directions for completing the checklists are sufficiently clear. Instructions for the monitors will be thorough and standardized. Diverse representation with respect to race and gender in these committees will be sought.



Analyze Task Data

Incumbents and supervisors who perform ratings will also provide biographical information, including ethnic group membership, gender, level of education, and aspects of work experience. These SMEs' biographical data will be summarized for the tested position.

In order to ensure reliable data, only those tasks that meet certain decision rules as essential tasks will be retained for further study. Lawshe's Content Validation Formula may be employed to assess degrees of agreement on task ratings.

Identify KSAs, Link KSAs and Rate KSAs

Identification of the important KSAs will be accomplished using groups of 8 to 12 incumbents and supervisors and a Technical Conference format. The instruments will be administered to an appropriate sample using the same sampling techniques employed for the task analysis. Diverse representation with respect to race and gender in these committees will be sought.

Analyze KSA Ratings

This data will be analyzed in our Scoring Center, using predetermined decision rules for determining which are the essential KSAs and what relative weight each should play in the examination process.

Prepare Job Analysis Data for the Tested Ranks

We will prepare and submit a Job Analysis Report covering all phases of the job analysis activities for each tested rank. Each job Analysis Report will comply with relevant professional and legal guidelines.

S.O.S. 3. In the event that the most appropriate method of examination includes more than one test component, the Consultant shall recommend a) whether a minimum or critical point of competency should be set for each test component and, if so, recommend the minimum or critical point of competency for each such component; b) the appropriate sequence of said tests including whether or not any such tests should utilize a compensatory scoring model or a multi-hurdle approach, and c) the most appropriate weights that should be allocated to each test. Said recommendations will be based on the results of the job analysis.

4. Recommend Promotional Process for the Tested Ranks

Upon completion of the job analysis for each of the tested ranks, our firm will conduct work meetings with the appropriate decision-makers within the City and Public Safety Departments regarding the appropriate promotional process and exercises we would recommend. Per the RFP, Morris & McDaniel will recommend a) whether a minimum or critical point of competency for each such component; b) the appropriate sequence of said tests including whether or not any such tests should utilize a compensatory scoring model or a multi-hurdle approach, and c) the most appropriate weights that should be allocated to each test. Said recommendations will be based on the results of the job analysis.

5. Develop and Draft the Examination Plan Including Component Weights

The data collected to this point will drive this decision. We will work with the City and recommend weights for the examination components for each rank. Of course, the analysis of the job data and collaboration with the Department decision makers will determine the appropriate formats.



6. Submit Draft Examination Plan to City Staff and Appropriate Decision-Makers for Approval

After we have drafted a proposed format for the examination process, we will submit this plan and the rationale behind it to the appropriate people for their review. Following this collaboration, the plan will be used for announcement purposes.

7. Develop Draft List of Reading List Sources and Texts for the Appropriate Tested Ranks

Based on results of the Job Analysis Morris & McDaniel will draft a list of sources for consideration by the City and Public Safety Departments for the written test for the tested ranks. We would recommend the Department create a committee of SMEs to review the list of source suggestions we create and select the reading list sources for the written test for the tested ranks. The list of sources or texts on knowledges that are relevant to the targeted positions will be presented to SMEs. They will be asked to eliminate those texts that might be problematic in terms of Department operations and to identify those that would complement the Department operations and vision. A final reading list for the candidates will be presented and recommended as an outcome.

8. Develop Examination Schedule

Morris & McDaniel will work with the City and Public Safety Departments decision-makers to prepare an examination schedule for each rank within the individual Public Safety Department. These schedules are often driven by a number of factors – union contracts, City policies, Departmental preferences. Sufficient time must be provided for distribution of the final Reading List prior to job knowledge tests, for scheduling Candidate Orientation Sessions, for Administrator Training, for Assessor/Rater/Interviewer Training, etc. The final schedule will reflect all of these factors and City preferences for testing dates.

The Examination Schedule will reflect adequate time to ensure that the test administrators and assessors/raters/interviewers are appropriately trained. We follow psychological standards in determining the length and nature of that training.

9. Assist with Announcement

Morris & McDaniel will assist the Department in preparation of communications sent to all candidates, to include the development of an announcement for all ranks that may include the following information: 1) a reading list for tested ranks, 2) the location where the source materials on the reading list will be available for tested ranks 3) the application procedure and application deadline for each rank, 4) eligibility guidelines for each rank and the location of the testing components for each rank, 5) an outline and explanation of all elements of the promotion process and details about assessment activities, 6) dates for candidate orientation at times needed to accommodate shifts so all candidates can have the opportunity to attend, and 7) a timeline for the process so candidates can schedule their time and supervisors can provide for staffing.

S.O.S. 4. Consultant shall develop and provide appropriate candidate preparation resources and materials relative to all testing components of the selection process

10. Develop and Conduct Candidate Orientation Sessions

Morris & McDaniel will develop and provide all appropriate candidate preparation resources and materials relative to all testing components of the selection process. Morris & McDaniel is a strong advocate of candidate orientation briefings. We find that these sessions “level the playing field.” If some candidates have had previous experience with



a particular promotional assessment process, they have a potential advantage due to familiarity with the approach. By giving all candidates information about the assessment process, we eliminate errors that are referred to as methodological variance (resulting from some candidates being familiar with the process, while others are not). We also believe that candidate orientation sessions are beneficial in reducing adverse impact. Professional psychological standards provide guidance on candidate and test taker orientation as do the Guidelines and Ethical Considerations for Assessment Center Operations.

Morris & McDaniel has over 44 years of experience in developing and conducting candidate orientation sessions for written tests and the promotional assessment center programs. We anticipate conducting several on-site sessions approximately two (2) to three (3) hours in length per rank, with an adequate amount of extra time allowed for questions and answers, for all promotional components for each of the targeted ranks to accommodate the City's shift schedules. Orientation handouts are provided by our firm. At this point it is not known for certain what promotional exercises will be appropriate for each of the targeted ranks within the Public Safety Departments. However, the following outline is a sample of the topics covered in candidate orientations for a promotional system with a written test and some form of a performance-based assessment (i.e., oral boards, assessment centers). Candidates are provided with information on the following topics:

- Overview of the Examination Plan with Test Date, Time and Location
- Test Security
- Test Components/Content
- Written Multiple-Choice Examination
- Performance-Based Assessment
 - Informed Participation
 - What is a Performance-Based Assessment?
 - History of Performance-Based Assessments
 - Performance-Based Assessment Dimensions
 - Scoring the Performance-Based Assessment
 - Performance-Based Assessment Exercises
 - Administrative Logistics
- Preparation Strategies for the General Multiple-Choice Test and Performance-Based Exercises
- Rules of Conduct
- Overall Helpful Suggestions

We have found these candidate orientation sessions to be effective in reducing candidate anxiety regarding the assessment process. They help candidates to perform at their maximum capability and ensure that they have adequate knowledge regarding the City's policies and procedures for the promotional process.

The Guidelines and Ethical Considerations for Assessment Center Operations (2015) support "Informed Participation" on the part of the candidates. They state, "The organization is obligated to make an announcement prior to assessment so that the participants will be fully informed about the program. The following basic information should be given to all prospective participants:

1. The objectives of the program and the purpose of the performance-based exercise.
2. How individuals are selected to participate in the performance-based assessment exercises.



3. Any options the individual has regarding the choice of participating in the assessment exercises as a condition of employment, advancement, development, etc.
4. General information on the assessor staff, including composition and assessor training.
5. What assessment exercise materials are collected and maintained by the organization.
6. How the assessment exercise results will be used, and the length of time the assessment results will be maintained on file.
7. When and what kind of feedback will be given the participants.
8. The procedure for reassessment (if any).
9. Who will have access to the assessment exercise reports and under what conditions?
10. Who will be the contact person responsible for the records? Where will the results be stored?"

It is our understanding that orientation sessions shall be held in Department provided facilities. We recommend the Department video-tape the first session, complete with Question and Answer (Q&A) session, lasting approximately two (2) to three (3) hours, and re-play the video-tape for all subsequent sessions with a personal introduction by a company representative and followed by a Q&A session by the in-person company representative. After all sessions are complete, a list of Q&A's is then posted for all candidates. This ensures all candidates are given the same information. In addition, if a candidate is unable to attend one of the orientation sessions or has additional questions, he/she can set up a date and time with the Department to review the orientation tape (if the Department deems appropriate).

S.O.S. 2. Consultant will provide exam development of any/all products or services recommended as components appropriate for use in the selection process. Consultant shall be guided by the results of the job analysis process in developing all products and services..

11. Develop Written Test and Performance-Based Assessment Exercises for the Tested Ranks

Multiple Choice Written Test –

Per the RFP Morris & McDaniel will provide exam development of any/all products or services recommended as components appropriate for use in the selection process.

S.O.S. 5. Consultant will provide any and all materials, written or otherwise, associated with any and all products or services recommended as components appropriate for use in the selection process. This may include, but not necessarily be limited to, printing of any and all exam materials, including answer sheets, with all appropriate security provided preventing unauthorized persons from having access; exam administration of any and all recommended components, instructions to candidates, all necessary supplies, supervision, distribution and collections of all exam materials and appropriate number of test monitors/proctors. Any and all examination components will be conducted on date(s) and time(s) agreed upon by Human Resources and the Consultant. Human Resources will be responsible for securing all necessary test sites

Our firm will develop a written knowledge test, for the tested ranks and provide all details of the written exam administration, candidate and administrator's test instructions, all necessary test supplies, supervision, distribution and collection of all exam materials and appropriate number of test monitors (we understand the City may provide assistance with test administration). Morris & McDaniel will be guided by the results of the job analysis



process in developing all products and services. In addition, a set of administrative procedures (including proctoring, scoring, and statistical analysis of the examination questions) and booklets (including general methodology utilized in the examination questions development) will be provided. Morris & McDaniel has over 44 years of experience in item writing for written knowledge tests used as components of promotional systems. We follow item writing techniques which are described in numerous publications. Our firm has developed a system of item writing, review, and revision which has proven to be quite successful in clearly expressing the question and alternatives.

Some of the principles of item writing which we follow are listed below:

- Clarity
- Accuracy
- Appropriate difficulty level (for screening at the desired level)
- Plausibility of distracters
- Straightforward (non-complex) word arrangement
- Avoidance of irrelevant clues
- Avoidance of negatively stated items
- Grammatical accuracy
- Avoidance of terminology that might contribute to cultural and gender bias
- Screening by skilled and knowledgeable editors

Based on the information collected about the specific position or rank and other job-relevant data, Morris & McDaniel will initially conduct item writing sessions to develop the customized item bank consisting of over 100 questions for each of the tested ranks (unless the Department will allow test questions to be used over one or more tested ranks) so that the extra questions can be eliminated during an SME review. Each question will have four (4) answer options and will be a closed book format. We do not recommend the use of "True/False" questions, nor do we use Answer D responses which state "all of the above," "none of the above," etc. To the fullest extent possible, our firm will ensure that each question is job related. If the Department allows for a review, an item review session will be scheduled with Subject Matter Experts (SMEs) within the Department for accuracy and appropriateness. SMEs will be required to sign a security agreement to ensure confidentiality of the content of the items. The final exam that is administered to eligible candidates will consist of 100 items. Each examination will be scanned, scored, and verified to ensure quality assurance in the offices of Morris & McDaniel within a timeframe that meets the needs of the Department.

Our firm has successfully implemented numerous appeals processes and will discuss these options with the appropriate decision-makers to determine which is best suited for the Department.

Individual written feedback, indicating final raw and percentage scores, will be provided to all candidates. The written tests will be organized by reference source and page citation allowing for more structured review and feedback.

Performance-Based Assessment Exercises –

Our firm is a leader in developing assessment methods for measuring knowledges and supervisory skills of public safety and protective service personnel. We have developed many types of tests and exercises, and we have used many different types of technology to adapt the measuring process to the demands of both the job and the administrative logistics.



Typical performance-based exercises that could be used are as follows:

- An **In-Basket Exercise** including items a Supervisor might deal with, such as memos, telephone messages, background information, a partial organizational chart and a calendar. Candidates are to take appropriate action on each item.
- A **Situational Exercise** consisting of hypothetical situations or questions of general inquiry. Hypothetical situations will be standardized across candidates.
- A **Subordinate Problem Exercise** where the candidate is presented with a packet of information which he/she must study prior to the question/answer period. The instructions identify the role that the candidate must assume and provide background information necessary to answer questions asked by a Supervisor.
- An **Oral Presentation/Oral Interview Exercise** concerning a problem/situation relevant to law enforcement/fire service/public safety, with identical instructions for all candidates, where the candidate must analyze the problem/situation and present a plan of action in an oral presentation.
- An **Oral Tactical Exercise** consisting of a scenario presented in which candidates are to respond orally, applying law enforcement/fire service/public safety knowledge, skills and abilities.

Of course, these are only examples. Exercises will be chosen based on the job analysis, and the specific exercises developed will be tailored to the City's specific needs as determined by each rank's job analysis. Each assessment rank within the different Public Safety Departments shall include various test components appropriate to the specific rank.

It is assumed that the performance-based exercises will measure primarily the administrative/supervisory components of the jobs. The primary objective of the assessment exercises will be to identify and rank order high potential individuals for promotion to the targeted ranks. None of our performance-based tests have had adverse impact on women or minorities.

Morris & McDaniel, Inc. is a leader in the field of conducting video-recorded exercises and encourages Public Safety Department and City decision-makers in the use of this procedure. Morris & McDaniel will develop all video-recorded exercises and can provide ALL audio and video monitors and recorders necessary to conduct a standardized promotional process.

12. Review by Approved Subject Matter Experts

To further ensure content validity of the written exam and the assessment center exercises, Morris & McDaniel will conduct a review with subject matter experts from within the appropriate Department. In order to ensure that the items are correctly keyed, exercises are appropriate, and are properly tailored to the particular organization, we will have all test items and/or exercises reviewed by competent SMEs.

13. Incorporate Changes and Develop Final Copy for Reproduction Purposes

Any changes recommended from the above SME review will be incorporated. A final copy of the exercises and written test will be used for duplicating purposes.



14. Conduct Administration and Scoring of the Written Examinations

Morris & McDaniel can conduct the administration and scoring of the written examinations. Morris & McDaniel recognizes the importance of exam administration. The most valid assessment can be made invalid by a faulty administration process. It is for this reason we always provide a structured test administration guide and training for all administrators. Morris & McDaniel will be responsible for administering the exam as required.

Other Information 1. There is NO requirement to set a passing point on tests or test components.

15. Use Committee Incumbents and Supervisors as SMEs to Establish Estimated Cut-off Scores, if needed

Establish Estimated Cut Off Scores

If the City chooses to require a cut score, Morris & McDaniel will recommend the appropriate passing exam score; however, per the RFP, we understand the City has no requirement to set a passing point on tests or test components. In the event the City does choose to set one, the following procedures are recommended.

Oftentimes job designers and/or others determine that if a candidate scores below a certain level on a test then they do not have the minimum prerequisite knowledge or abilities to be placed on a candidate list. If this is the case in this situation, we would recommend considering the use of one of several procedures such as the Angoff procedure combined with a "reality test" (see Section 17) to establish the passing score. This procedure has withstood legal challenges up to the U.S. Supreme Court and is a procedure that has face validity for the candidates. It requires a committee of knowledgeable Subject Matter Experts (SMEs) to review each item on the examination and determine if a minimally qualified candidate should score that item correctly. The sum of the averages of the SMEs gives an estimated cut off that should be modified depending on how the candidates actually scored on the test. Sometimes cut off scores are not used.

S.O.S. 7. Consultant will score and analyze any and all test components utilizing scoring methodologies appropriate to each component and which reduce subgroup differences of each component used. Consultant shall also include a demographic analysis and a review for adverse impact following the 80% Rule of the Federal Guidelines for each component utilized. When the results conclude from a small number of cases, Consultant shall use the most appropriate statistical procedure to analyze results for adverse impact. Consultant shall submit a Technical Validation Report (as specified below) and then all scoring results and accompanying analyses to the City's Director of Human Resources along with a certified statement attesting to the accuracy of all said results.

16. Analyze Test Results and Conduct all Appropriate Analysis for Adverse Impact

Item analysis, item difficulty, score distributions, and other relevant analyses including how members of protected groups scored will be reviewed, and the standard error of each test will be calculated. Statistical tests for determining adverse impact will be conducted for all protected groups. All test components will meet the validation requirements to refute any challenge based on adverse impact. While multiple-choice examinations may have adverse impact, performance-based assessments can be constructed to be free of adverse impact. Furthermore, per the RFP, Morris & McDaniel will include a demographic analysis and review for Adverse Impact following the 80% Rule of the Federal Guidelines for each component used. When the results conclude from a small number of cases, Morris & McDaniel will use the most appropriate statistical procedure to analyze the results for adverse impact.



17. Using A “Reality Test” Approach Recommend Final Cut-Off Score or Discuss Other Available Options with City Decision-Makers

Using a "reality test," that is, looking at the actual scores of the candidates, in making final determination of the cut off score is recommended (see Passing Scores: A Manual for Setting Standards of Performance on Educational and Occupational Tests; Livingston, Samuel A., and Zietz, Michael J.; 1982, Educational Testing Service, Princeton, New Jersey). In making the final passing score determination, it is recommended that considerations be given to the standard error and clustering of scores. Depending on the policy of the organization, affirmative action policies may also be considered. If the City and/or Departments have a preference for alternative methods, these methods will be employed to determine the cutoff and steps 15, 16, and 17 will be omitted. There are other options available and these can be discussed with City decision-makers.

18. Candidate Review and Appeal

Our firm has had extensive experience in developing model appeal procedures which comply with all elements in administrative law. Our firm has developed test review procedures for other clients and, we will follow the appeals process as well as present various options available for candidate review and appeal. In discussion with the Department decision-makers, informed decisions can be made on this issue. Factors to consider are:

- Test Security Issues
- Administrative Cost in Scheduling and Monitoring
- Fourteenth Amendment Rights
- Local Rules and Ordinance which may govern or impact

19. Administer the Performance-Based Assessment Exercises

Our Morris & McDaniel team, including senior staff consultants, will be on site for supervising and participating in the administration of the performance-based assessment exercises. All exercises can be administered in such a way that no one candidate will have an opportunity to acquire additional information regarding the exercise content before he or she actually takes the exercise.

Our recommended test schedule method represents an improvement over the administration of the same exercise over several days and ensures no breach of test security. Our firm will work with the staff to train them on the administration, set-up, and breakdown of assessment procedures.

Morris & McDaniel, Inc. is a leader in the field of conducting video-recorded exercises and encourages City decision-makers to consider use of this procedure. In many instances, because of the number of candidates, innovations were used which included video-based behavioral-based situational exercises, multiple-choice formatted management exercises, and extensive use of video recordings to ease the administrative burdens associated with the use of live assessors and large numbers of candidates. In addition, the use of video increases the security and the standardization of the assessment process to ensure a fair and valid process for all candidates participating. Our firm can provide ALL audio and video monitors and recorders necessary to conduct a standardized promotional process.

Our firm can work with the City on mutually agreeable dates for the assessment administration for the tested ranks.



Other Information 2. Video recording of oral exercises has been done for some previous exams.

Live Vs. Video Assessment Administration

The current research on administering exercises and scoring candidates in assessment centers strongly supports video-recording candidates and interactive role-playing exercise and having assessors view the recorded performance and score each exercise from the video tape.

Our firm is a national leader in the use of video-based testing technology using two (2) digital video tape camcorders (primary and back-up) and a digital audio tape recorder as additional back-up to record each candidate response to each exercise. Recent lawsuits in Federal Court (see Appendix G) have actually turned on the fact that videotaping was NOT used, costing the City of Akron, Ohio a judgment of Two Million Dollars (\$2,000,000.00).

The current research on administering exercises and scoring candidates in assessment centers strongly supports video-recording candidates and candidate's interaction with role players and having assessors view the recorded performance and score each exercise from the video tape.

Published research (see Appendix H) says that it is more accurate and practitioners report that it permits all candidates to receive a fair evaluation.

Provide Digital Audio/Video Equipment

If video-based assessment is selected again by the Department, Morris & McDaniel will develop all exercises and can provide ALL required digital video and audio recording equipment; DVDs for proper assessment center administration; and flat screen TVs, headphones, and DVD players for assessor's scoring. However, if the Department wishes to conduct a live administration without video recording, our firm will conduct the testing as the Department chooses.

20. Assessor/Rater Training

Morris & McDaniel firmly believes that the quality of the assessment center exercises is dependent upon the quality of the assessor/rater training. It is important to select individuals from other jurisdictions who have the potential to be good assessors (good observational, recording and evaluating skills, free from bias) and to place them in a comprehensive training program to test their assessor/rater skills for a given promotional system.

S.O.S. 6. In the use of a proposed oral exam, Consultant will seek, secure and train assessors in conducting and scoring the exam. Diversity within the assessor group in terms of race, age, gender and ethnicity will be required. Consultant must also provide orientation/training of the assessors. In an effort to mitigate the chances of assessor-to-candidate familiarity, Consultant is expected to recruit and provide assessors search. Consultant will be responsible for providing travel and all other expenses for assessors and should budget this item in the bid/proposal accordingly.

Per the RFP, in the use of a proposed oral exam, Morris & McDaniel will seek, secure, and train assessors in conducting and scoring the exam, thus helping to ensure a reduced chance of assessor-to-candidate familiarity. Morris & McDaniel not only strives to seek diversity within the assessor group but is nationally known for our ability to incorporate it in our proctors/trainers/assessors. We will recruit assessors with diversity in terms of race,



age, gender and ethnicity. We will be responsible for all assessor costs including travel. Morris & McDaniel will budget this item in our bid/proposal accordingly.

Morris & McDaniel follows the procedures outlined for assessor/rater training in the Guidelines and Ethical Considerations for Assessment Center Operations.

A diverse group of assessors, equal to the tested rank or higher and including ethnic, racial and gender diversity, will be recruited from surrounding jurisdictions and trained to rate and evaluate each rank. A panel of four (4) assessors will be recruited for each exercise, with three (3) assessors seated for scoring each exercise in the performance-based assessment. We will conduct a one and one-half to two-day training session for assessors immediately prior to the assessment activities.

Morris & McDaniel recognizes the importance of a well-trained cadre of assessors to ensure the successful operation of public safety performance-based assessment programs. A principal or senior researcher from our firm will be on-site to conduct the assessor training and to monitor the entire scoring process.

A sample table of contents for assessor training is provided below.

TABLE OF CONTENTS

I.	Introduction.....	1
II.	Outline of Assessor Training Program	2
III.	History of Performance-Based Exercises	5
IV.	Assessment Center Principles: <u>Standards and Ethical Considerations</u>	8
V.	Assessment Center Dimensions and Exercises.....	14
VI.	Behavioral Observation and Recording	23
VII.	Use of Assessor Report Forms.....	26
VIII.	Recognizing and Classifying Behavior by Dimensions.....	36
IX.	Rating Behavior.....	41
X.	Evaluating Behavior by Dimensions	45
XI.	Practice on the Actual Exercises	48
XII.	Exercise #1.....	49
XIII.	Exercise #2.....	89
XIV.	Exercise #3.....	150
XV.	Assessment Council Activities	181
XVI.	Guidelines for Assessors.....	192
XVII.	Schedules and Administration	194

During each training session, each assessor will receive a written reference manual for use and study and will be evaluated to determine his or her ability to:

1. Recognize, observe, and report the behaviors measured in the exercise;
2. Classify behaviors into the appropriate dimensions; and
3. Score the performance-based exercise.

The performance-based exercise will be assessor scored using consensus procedures and the following scale:

- 7 - 6.1 Superior
- 6 - 5.1 Very Good
- 5 - 4.1 Good
- 4 - 3.1 Clearly Competent
- 3 - 2.1 Needs Some Improvement



2 - 1.1 Needs Considerable Improvement
1 - 0.1 Poor

A seven-point scale is used to provide for adequate range. The scores are typically converted to a 100-point scale.

During the training sessions the assessors will participate in a mock performance assessment to ensure that they have obtained a thorough knowledge and understanding of the assessment techniques used and of the dimensions being assessed. Their participation in this mock center will help them to acquire skill in behavior observation and recording, as well as thorough knowledge of the evaluation and rating procedures. Assessors will also become acquainted with the assessment policies and practices of the City's assessment program.

Monitoring the Assessment Scoring Procedures

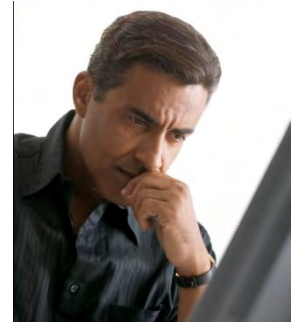
One or more senior researchers from our firm will remain on-site to monitor the assessors' scoring activities after the performance-based exercises have been administered. The length of time for this varies depending on the number of candidates and type and number of exercises, but we will assume several days of assessing will be required.

COVID-19 Assessor Scoring. Morris & McDaniel has within the last several months developed several Assessment Centers using CDC complying procedures. We also scored the Assessment Center using remote procedures that comply with all the regulatory requirements listed in this RFP and also comply with the International Congress on Assessment Center requirements.

S.O.S. 11. Consultant shall provide brief written and/or oral feedback to candidates to help candidates understand their areas of strength and weakness.

21. Score Reports and Feedback

Accurate and timely score reports and feedback are essential to an effective promotional screening program. These are high stakes testing programs, and the candidates are eager to learn how well they performed as well as to learn what they must do differently to perform at an even higher level. Morris & McDaniel has had extensive experience in developing a variety of score and feedback reports. We shall work with the Department to determine (a) what types of reports the candidates have been receiving in the past, (b) Department preferences for future report formats (any improvements that they wish to have made) and (c) scheduling for the delivery of scores and feedback for a given promotional examination. Per the RFP, Morris & McDaniel will provide brief written and/or oral feedback to candidates to help them understand their areas of strength and weakness. Our firm will work closely with the City to meet the timelines of delivery of final results and score reports.



S.O.S. The City will afford the Consultant the option of being present when candidates review their exams so that the Consultant can keep control over the secure test content, if so desired.



22. Assist with Grievance/Challenge

Candidate Review and Appeal

Morris & McDaniel believes that candidate review and appeals support the perception of a fair test process. Our firm has been successful in implementing such appeal/challenge procedures with other public safety agencies and, if acceptable, our firm will assist the City in addressing the candidates' appeals. Furthermore, Morris & McDaniel will be present when candidates review their exams so we may keep control over the secure test content.

23. Present City with List of Eligibles for Each Tested Rank

Upon completion of the scoring process, our firm will present the City with a List of Eligibles for each tested rank. The list can be presented to the City by several methods - by top down scoring, by alphabetical last name or employee number, etc. listing, all in electronic format.

S.O.S. 8 Within 45 days of completion of the work on any exam project, the Consultant shall provide a technical report addressing the validity of the examination process. The validation report shall summarize the work done in the exam project. This report should be designed to address the guidelines/standards/principles in the following documents: (1) Uniform Guidelines on Employee Selection Procedures, (2) Standards for Educational and Psychological Testing (2014 edition), and (3) the Principles for the Validation and Use of Personnel Selection Procedures. Said report must include, but is not limited to, the items listed below. a. Complete narratives of all work including a report on the job analysis and an explanation of the validity methodology used. b. A list of any and all subject matter experts, assessors and proctors used if used in any phase of the process. c. A summary of all scoring and rationale for the scoring models used in all components of the examination process, including all recommended cut points supporting minimum or critical points of competency. d. Adverse impact analyses in accordance with the Federal Uniform Guidelines, and through tests of significance. e. Any other information detailing the steps taken in the exam development, exam administration and exam scoring process to meet the requirements of the: (1) Uniform Guidelines on Employee Selection Procedures, (2) Standards for Educational and Psychological Testing (2014 edition), and (3) the Principles for the Validation and Use of Personnel Selection Procedures.

24. Submit Technical Validation Report

Within 45 days of completion of the work on any exam project our firm will submit a Technical Validation Report along with all scoring results and accompanying analyses for each promotional system covering all assessments for a given rank as per the RFP. Each Technical Validation Report will be comprehensive and include all the steps used in the development, administration, and scoring process (to include, but not limited to, the results of the job analysis and the linking of the job analysis to the examination materials and address the guidelines/standards/principles in the following documents: (1) Uniform Guidelines on Employee Selection Procedures, (2) Standards for Educational and Psychological Testing (2018 edition), and (3) the Principles for the Validation and Use of Personnel Selection Procedures). Specifically, per the RFP, Morris & McDaniel acknowledges that the Technical Validation Report must include, but is not limited to, the items below:

- a. Complete narratives of all work including a report on the job analysis and an explanation of the validity methodology used.
- b. A list of any and all subject matter experts, assessors, and proctors used if used in any phase of the process.
- c. A summary of all scoring and rationale for the scoring models used in all components of the examination process, including all recommended cut points supporting minimum or critical points of competency.
- d. Adverse impact analyses in accordance with the Federal Uniform Guidelines, and



through test of significance.

- e. Any other information detailing the steps taken in the exam development, exam administration and exam scoring process to meet the requirements of the: Uniform Guidelines on Employee Selection Procedures, (2) Standards for Educational and Psychological Testing (2018 edition), and (3) the Principles for the Validation and Use of Personnel Selection Procedures.

S.O.S. 10. Consultant must be prepared to defend all rendered test services and products in the event of a legal challenge. Consultant must also certify the accuracy of all submitted results by certifying to their accuracy in writing.

25. Provisions for Expert Testimony

Dr. David M. Morris, President of Morris & McDaniel, has been an expert witness in Federal Court on numerous occasions. With a few exceptions, these were Title VII cases. Dr. Morris is a Psychologist with licensing in Industrial/Organizational Psychology and an attorney who has been recognized by the profession of Industrial/Organizational Psychology as an authoritative source in designing personnel systems which emphasize legal fairness and legal defensibility. Dr. Morris will be available for expert testimony should this need develop. We will represent the City as an expert witness in all court proceedings and grievances throughout the process against all claims regarding the testing and assessment procedures. We will be prepared, if necessary, to provide expert testimony before governing bodies, in a civil service hearing or in a court of law. Any required testimony shall be considered a part of the pricing Agreement resulting from the overall contract.

Other Information 3. Consultant is required to maintain all files concerning the test for 5 years or until the completion of any legal challenges, should there be any.

Per the RFP, we will maintain all files concerning the test for five (5) years or until the completion of any and all legal challenges, should there be any.

S.O.S. 9. Based on method proposed by Consultant for an examination review process, Consultant shall provide whatever materials are necessary for the City to conduct a review at the conclusion of the examination process.

Integrity of Exams

Per the RFP, Morris & McDaniel will provide whatever materials are necessary for the City to conduct a review at the conclusion of the examination process. Overexposure can happen if the frequency of exam administration is high enough, in which case certain steps are taken to assure a parallel exam. There are numerous procedures that can be used to mitigate this, such as, randomly changing the order of the questions, modifying the stem, and changing the order of the choices. In addition, multiple parallel tests have been used successfully in jurisdictions where the test is given over multiple years which successfully addressed the issue of overexposure of the exam.

Our information claimed as proprietary and confidential ends here.



E. TIMELINES

E. Scheduling availability for the anticipated exams and timelines for processing and reporting of exam results.

In 44 years, our firm has never failed to meet the testing schedules that our clients have required. We have a full professional staff of qualified persons that can assist with meeting the required schedule of entry-level and promotional exams for the City of Stamford. We are able to provide exam scores within 48 hours of receipt in our scoring center.



F. COST

F. Complete cost for each of the exams.

Each proposal should include a detailed fee proposal for each examination. Fees should be presented, if applicable, in terms of per applicant cost and/or hourly rates. Out-of-pocket expenses should be listed and refer to specific tasks identified in the scope of work contained in this RFP. Additionally, a total figure should be included, including all hourly rates, expenses, overhead and other costs. Discounts offered for an award encompassing multiple examinations should be clearly stated.



STAMFORD FIRE ASSISTANT FIRE MARSHAL SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 1,750.00
Two	Conduct Job Analysis	\$ 2,500.00
Three	Develop Written Test	\$ 2,250.00
Four	Develop Oral Assessment Exercises	\$ 1,250.00
Five	SME Review	\$ 400.00
Six	Administer and Score Written Test	\$ 1,200.00
Seven	Administer Oral Assessment Exercise	\$ 2,750.00
Eight	Recruit and Train Assessors	\$ 1,750.00
Nine	Oversee Assessment Exercise Scoring	\$ 1,250.00
Ten	Provide Candidate Feedback	\$ 400.00
Eleven	Second Review	\$ 200.00
Twelve	Issue Final List and Compile Validation Data	\$ 200.00
	TOTAL PROFESSIONAL SERVICES	\$ 15,900.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	
Two	Oral Exercise Video - Temp Staff Services	\$ 1,500.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 5,000.00
	TOTAL EXPENSE ITEMIZATION	\$ 6,500.00
	TOTAL PRICE FOR 6 CANDIDATES	\$ 22,400.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD DEPUTY FIRE CHIEF SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 2,250.00
Two	Conduct Job Analysis	\$ 2,500.00
Three	Develop Written Test	\$ 2,000.00
Four	Develop Oral Assessment Exercises	\$ 1,600.00
Five	SME Review	\$ 800.00
Six	Administer and Score Written Test	\$ 1,000.00
Seven	Administer Oral Assessment Exercise	\$ 2,750.00
Eight	Recruit and Train Assessors	\$ 1,800.00
Nine	Oversee Assessment Exercise Scoring	\$ 2,000.00
Ten	Provide Candidate Feedback	\$ 600.00
Eleven	Second Review	\$ 1,200.00
Twelve	Issue Final List and Compile Validation Data	\$ 600.00
	TOTAL PROFESSIONAL SERVICES	\$ 19,100.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 500.00
Two	Oral Exercise Video - Temp Staff Services	\$ 1,600.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 11,500.00
	TOTAL EXPENSE ITEMIZATION	\$ 13,600.00
	TOTAL PRICE FOR 20 CANDIDATES	\$ 32,700.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD DEPUTY FIRE MARSHAL SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 2,000.00
Two	Conduct Job Analysis	\$ 3,500.00
Three	Develop Written Test	\$ 2,500.00
Four	Develop Oral Assessment Exercises	\$ 2,500.00
Five	SME Review	\$ 650.00
Six	Administer and Score Written Test	\$ 1,200.00
Seven	Administer Oral Assessment Exercise	\$ 1,200.00
Eight	Recruit and Train Assessors	\$ 2,000.00
Nine	Oversee Assessment Exercise Scoring	\$ 1,500.00
Ten	Provide Candidate Feedback	\$ 1,000.00
Eleven	Second Review	\$ 600.00
Twelve	Issue Final List and Compile Validation Data	\$ 600.00
	TOTAL PROFESSIONAL SERVICES	\$ 19,250.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 250.00
Two	Oral Exercise Video - Temp Staff Services	\$ 1,500.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 11,250.00
	TOTAL EXPENSE ITEMIZATION	\$ 13,000.00
	TOTAL PRICE FOR 15 CANDIDATES	\$ 32,250.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD FIRE CAPTAIN SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 2,200.00
Two	Conduct Job Analysis	\$ 5,500.00
Three	Develop Written Test	\$ 3,000.00
Four	Develop Oral Assessment Exercises	\$ 3,000.00
Five	SME Review	\$ 1,500.00
Six	Administer and Score Written Test	\$ 3,500.00
Seven	Administer Oral Assessment Exercise	\$ 4,750.00
Eight	Recruit and Train Assessors	\$ 3,750.00
Nine	Oversee Assessment Exercise Scoring	\$ 3,600.00
Ten	Provide Candidate Feedback	\$ 1,250.00
Eleven	Second Review	\$ 2,000.00
Twelve	Issue Final List and Compile Validation Data	\$ 1,000.00
	TOTAL PROFESSIONAL SERVICES	\$ 35,050.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 250.00
Two	Oral Exercise Video - Temp Staff Services	\$ 2,800.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 15,580.00
	TOTAL EXPENSE ITEMIZATION	\$ 18,630.00
	TOTAL PRICE FOR 50 CANDIDATES	\$ 53,680.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD FIRE ENTRY LEVEL SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Meeting	\$ 4,250.00
Two	Conduct Job Analysis	\$ 16,500.00
Three	Written Test Development	\$ 15,000.00
Four	Structured Oral Exercise Development	\$ 17,500.00
Five	SME Review	\$ 7,500.00
Six	Written Test Administration	\$ 7,500.00
Seven	Oral Exercise Administration	\$ 12,500.00
Eight	Oral Exercise Rater Training	\$ 7,500.00
Nine	Supervise Raters in Scoring of Candidates	\$ 5,000.00
Twelve	Deliver Final List and Compile Analysis Data	\$ 1,250.00
	TOTAL PROFESSIONAL SERVICES	\$ 94,500.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 6,000.00
Two	Oral Exercise Video - Temp Staff Services	\$ 3,500.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 13,000.00
	TOTAL EXPENSE ITEMIZATION	\$ 22,500.00
	TOTAL PRICE FOR 500 CANDIDATES	\$ 117,000.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$225.00 EACH.		
<p>As an alternative process, we urge consideration of our proven continuous testing for entry level positions that permits year-round recruitment and testing with the resulting ability to timely evaluate potential candidates. We can provide this form of testing at a price of \$35,000 for applicable licensing fees for the process plus \$15,000 for initial set-up, regular test maintenance and training together with a per candidate fee for written and oral testing of \$65.00. The licensing fee is a one-time fee and the \$15,000 is a recurring annual fee payable at the inception of each renewal year exercised by the jurisdiction.</p>		

STAMFORD FIRE LIEUTENANT SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 2,500.00
Two	Conduct Job Analysis	\$ 5,500.00
Three	Develop Written Test	\$ 3,000.00
Four	Develop Oral Assessment Exercises	\$ 3,000.00
Five	SME Review	\$ 1,500.00
Six	Administer and Score Written Test	\$ 2,500.00
Seven	Administer Oral Assessment Exercise	\$ 4,250.00
Eight	Recruit and Train Assessors	\$ 4,250.00
Nine	Oversee Assessment Exercise Scoring	\$ 4,500.00
Ten	Provide Candidate Feedback	\$ 1,250.00
Eleven	Second Review	\$ 2,000.00
Twelve	Issue Final List and Compile Validation Data	\$ 1,000.00
	TOTAL PROFESSIONAL SERVICES	\$ 35,250.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 350.00
Two	Oral Exercise Video - Temp Staff Services	\$ 2,800.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 15,250.00
	TOTAL EXPENSE ITEMIZATION	\$ 18,400.00
	TOTAL PRICE FOR 50 CANDIDATES	\$ 53,650.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD FIRE MARSHAL SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 1,500.00
Two	Conduct Job Analysis	\$ 2,500.00
Three	Develop Written Test	\$ 1,750.00
Four	Develop Oral Assessment Exercises	\$ 1,000.00
Five	SME Review	\$ 500.00
Six	Administer and Score Written Test	\$ 1,600.00
Seven	Administer Oral Assessment Exercise	\$ 2,750.00
Eight	Recruit and Train Assessors	\$ 2,000.00
Nine	Oversee Assessment Exercise Scoring	\$ 1,250.00
Ten	Provide Candidate Feedback	\$ 400.00
Eleven	Second Review	\$ 200.00
Twelve	Issue Final List and Compile Validation Data	\$ 200.00
	TOTAL PROFESSIONAL SERVICES	\$ 15,650.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 250.00
Two	Oral Exercise Video - Temp Staff Services	\$ 1,500.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 5,000.00
	TOTAL EXPENSE ITEMIZATION	\$ 6,750.00
	TOTAL PRICE FOR 6 CANDIDATES	\$ 22,400.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD POLICE CAPTAIN SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 1,200.00
Two	Conduct Job Analysis	\$ 2,800.00
Three	Develop Written Test	\$ 1,500.00
Four	Develop Oral Assessment Exercises	\$ 1,500.00
Five	SME Review	\$ 680.00
Six	Administer and Score Written Test	\$ 1,750.00
Seven	Administer Oral Assessment Exercise	\$ 2,250.00
Eight	Recruit and Train Assessors	\$ 1,250.00
Nine	Oversee Assessment Exercise Scoring	\$ 3,750.00
Ten	Provide Candidate Feedback	\$ 500.00
Eleven	Second Review	\$ 800.00
Twelve	Issue Final List and Compile Validation Data	\$ 400.00
	TOTAL PROFESSIONAL SERVICES	\$ 18,380.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 250.00
Two	Oral Exercise Video - Temp Staff Services	\$ 800.00
Three	Fixed Cost for Scoring Oral Assessment Videos	\$ 5,700.00
	TOTAL EXPENSE ITEMIZATION	\$ 6,750.00
	TOTAL PRICE FOR 10 CANDIDATES	\$ 25,130.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD POLICE ENTRY LEVEL SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Meeting	\$ 4,250.00
Two	Conduct Job Analysis	\$ 16,500.00
Three	Written Test Development	\$ 15,000.00
Four	Structured Oral Exercise Development	\$ 17,500.00
Five	SME Review	\$ 7,500.00
Six	Written Test Administration	\$ 7,500.00
Seven	Oral Exercise Administration	\$ 12,500.00
Eight	Oral Exercise Rater Training	\$ 7,500.00
Nine	Supervise Raters in Scoring of Candidates	\$ 5,000.00
Twelve	Deliver Final List and Compile Analysis Data	\$ 1,250.00
	TOTAL PROFESSIONAL SERVICES	\$ 94,500.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 6,000.00
Two	Oral Exercise Video - Temp Staff Services	\$ 3,500.00
Three	Fixed cost for scoring Oral Exercise Videos	\$ 13,000.00
	TOTAL EXPENSE ITEMIZATION	\$ 22,500.00
	TOTAL PRICE FOR 500 CANDIDATES	\$ 117,000.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$225.00 EACH.		
As an alternative process, we urge consideration of our proven continuous testing for entry level positions that permits year-round recruitment and testing with the resulting ability to timely evaluate potential candidates. We can provide this form of testing at a price of \$35,000 for applicable licensing fees for the process plus \$15,000 for initial set-up, regular test maintenance and training together with a per candidate fee for written and oral testing of \$65.00. The licensing fee is a one-time fee and the \$15,000 is a recurring annual fee payable at the inception of each renewal year exercised by the jurisdiction.		

STAMFORD POLICE LIEUTENANT SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 250.00
Two	Conduct Job Analysis	\$ 4,000.00
Three	Develop Written Test	\$ 4,250.00
Four	Develop Oral Assessment Exercises	\$ 4,250.00
Five	SME Review	\$ 1,000.00
Six	Administer and Score Written Test	\$ 3,750.00
Seven	Administer Oral Assessment Exercise	\$ 4,250.00
Eight	Recruit and Train Assessors	\$ 3,550.00
Nine	Oversee Assessment Exercise Scoring	\$ 3,500.00
Ten	Provide Candidate Feedback	\$ 1,000.00
Eleven	Second Review	\$ 1,000.00
Twelve	Issue Final List and Compile Validation Data	\$ 800.00
	TOTAL PROFESSIONAL SERVICES	\$ 31,600.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 350.00
Two	Oral Exercise Video - Temp Staff Services	\$ 1,600.00
Three	Fixed Cost for Scoring Oral Assessment Videos	\$ 16,240.00
	TOTAL EXPENSE ITEMIZATION	\$ 18,190.00
	TOTAL PRICE FOR 40 CANDIDATES	\$ 49,790.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

STAMFORD POLICE SERGEANT SELECTION PROJECT		
Professional Services Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Initial Planning Session	\$ 3,000.00
Two	Conduct Job Analysis	\$ 6,000.00
Three	Develop Written Test	\$ 3,250.00
Four	Develop Oral Assessment Exercises	\$ 3,500.00
Five	SME Review	\$ 1,750.00
Six	Administer and Score Written Test	\$ 2,750.00
Seven	Administer Oral Assessment Exercise	\$ 7,500.00
Eight	Recruit and Train Assessors	\$ 4,250.00
Nine	Oversee Assessment Exercise Scoring	\$ 8,500.00
Ten	Provide Candidate Feedback	\$ 1,250.00
Eleven	Second Review	\$ 1,500.00
Twelve	Issue Final List and Compile Validation Data	\$ 1,250.00
	TOTAL PROFESSIONAL SERVICES	\$ 44,500.00
Expense Itemization		
Morris & McDaniel, Inc., Proposer		
PHASE #	DESCRIPTION OF SERVICES	PRICE
One	Written Test Proctors	\$ 1,500.00
Two	Oral Exercise Video - Temp Staff Services	\$ 2,800.00
Three	Fixed Cost for Scoring Oral Assessment Videos	\$ 34,150.00
	TOTAL EXPENSE ITEMIZATION	\$ 38,450.00
	TOTAL PRICE FOR 100 CANDIDATES	\$ 82,950.00
PER RFP INSTRUCTIONS, ADDITIONAL CANDIDATES BEYOND THE ESTIMATED NUMBER INDICATED ABOVE WILL RESULT IN AN ADDITIONAL PER CANDIDATE COST OF \$750 EACH.		

PROVISIONS FOR EXPERT TESTIMONY

Dr. David M. Morris, President of Morris & McDaniel, has been an expert witness in Federal Court on numerous occasions. With a few exceptions, these were Title VII cases. Dr. Morris is a Psychologist with licensing in Industrial/Organizational Psychology and an attorney who has been recognized by the profession of Industrial/Organizational Psychology as an authoritative source in designing personnel systems which emphasize legal fairness and legal defensibility. Our firm will always provide as much expert witness assistance as needed by our clients. Dr. Morris will be available for expert testimony should this need develop. Fees for expert testimony services are \$3500 as a fully earned retainer. For testimony or deposition, fees are \$3500 for each day of deposition or any part thereof or for each day of testimony or any part thereof. If the day extends beyond a ten (10) hour period, the fee is \$350 for each additional hour. Research time is billed at \$350 per hour plus any related expenses. Airfare is billed at the least expensive, non-restrictive coach fare and hotels are billed at regular business class rates.



G. ADDITIONAL INFORMATION

G. Include any topics not covered in the Request for Proposals that you wish to disclose to the City which further describes your organization's level of qualification as an exam consultant.

COST OF LAWSUITS

The procedures we have outlined are procedures that have been evaluated in the legal area and found by all reviewed to be legally valid. Federal Judge Gex reported as follows in his findings and decree for Mississippi Highway Patrol which ended the longest running consent decree in American Jurisprudence (Appendix D). Lawsuits are expensive and none are more expensive than lawsuits regarding entry-level selection processes. See for example the One Hundred Million dollars (\$100,000,000) that the City of Chicago is subject to lose due to a unanimous decision by the U.S. Supreme Court (Appendix J). According to the article, the City of Chicago paid Four Million dollars (\$4,000,000) to have a system developed and it resulted in illegal adverse impact. Our systems have been tried and found by the Federal Courts to be valid.

SECURITY OF MATERIALS

Morris & McDaniel has effectively maintained the security of the assessment materials in all of our projects involving assessment programs for the past 44 years, and we have never had a breach of test security. We recommend the assessment schedules are prepared to ensure that candidates will not have an opportunity to discuss the exercises until after all candidates have taken a given simulation. This is important to the assessment programs since our firm prefers that all candidates be given identical instructions and hypothetical questions. Typically, Morris & McDaniel will start one group of candidates in the morning and have the other group report at noon prior to the release of the first group of candidates to ensure no communication between the two groups regarding the exercises given on that day.

Any use of City SMEs in the development and/or review of written test and/or assessment center exercises will be based on City approval. All approved SMEs will be required to sign Security/Confidentiality Agreements as part of their participation.

Morris & McDaniel acknowledges that every city has unique needs and is prepared to recommend and discuss procedures with the City to implement measures that best address the needs of the City.

CANDIDATE REVIEW AND APPEAL

Morris & McDaniel believes that candidate review and appeals support the perception of a fair test process. Our firm has been successful in implementing such appeal/challenge procedures with other public safety agencies and, if acceptable, our firm will assist the City in addressing the candidates' appeals. Our firm has had extensive experience in developing model appeal procedures which comply with all elements in administrative law.

Our firm has developed test review procedures for other clients and we will present to the City various options available for candidate review and appeal. In discussion with the Department decision-makers, informed decisions can be made on this issue. Factors to consider are:

- Test Security Issues
- Administrative Cost in Scheduling and Monitoring
- Fourteenth Amendment Rights
- Local Rules and Ordinance which may govern or impact



Morris & McDaniel acknowledges that every city has unique needs and is prepared to recommend and discuss procedures with the City to implement measures that best address the needs of the City.

TEST VALIDATION AND SELECTION ASSESSMENT EXPERTISE

Morris & McDaniel can develop tests and other methods designed to select the individuals whose strengths best match the demands of the job. Valid personnel tests will improve the organizations productivity and its competitive edge. Our firm is experienced in the development and validation of entry-level and promotional examinations designed to select the most suitable individuals for specific jobs.



EMPLOYEE SELECTION PROCEDURES

Our projects involve designing valid job-knowledge tests and assessment centers that are tailored to specific occupations and work settings, implementing the selection process for private and public sector clients and conducting structured interviews for placement of managerial personnel. Job-knowledge tests have been developed for numerous police and fire departments, social service workers, and grain operators to name only a few occupations. We have considerable experience in developing and implementing non-traditional tests, i.e., practical simulation tests using videos, multiple choice in-baskets, and structured oral interviews.



JOB ANALYSIS

Job analysis is the basis for all personnel management systems including test development, performance appraisal, staffing procedures, human resource planning, job classification and evaluation, and training program development. The job analysis procedure identifies work tasks and behaviors and the knowledge, skills, and abilities required to perform these tasks. Morris & McDaniel, Inc. has many years of experience in conducting job analyses for a broad range of blue- and white-collar occupations in both the private and public sectors. We have developed job analysis procedures that have withstood legal challenges on several occasions. We have designed and presented seminar programs for managerial personnel and job analysts on multi-purpose job analysis techniques. Morris & McDaniel, Inc. has conducted job analyses for physically demanding, as well as sedentary, occupations that require a wide variety of physical, cognitive, interpersonal, technical, managerial, and other skills.

ENTRY-LEVEL EMPLOYEE SELECTION, PROMOTION, AND PLACEMENT

Morris & McDaniel has considerable experience developing job-related employee selection and placement procedures. Our projects involve designing valid job-knowledge tests and assessment centers that are tailored to specific occupations and work settings, implementing the selection process for private and public sector clients, and conducting structured interviews for placement of managerial personnel. Job-knowledge tests have been developed for numerous police and fire departments, welfare case workers, correctional officers, and grain operators, to name only a few occupations. Morris & McDaniel has completed the development of job-related examinations for over 340 jobs in state government. To our knowledge, no other similar consulting firm has such an extensive base of experience with so many jobs found in local and state government organizations. With this base of experience, we have refined task inventories for a very extensive list of jobs in local and state government. We have considerable experience in developing and implementing non-traditional tests, i.e., practical simulation tests, using videos, multiple-choice in-baskets, and structured oral interviews. We have developed tailor-made oral boards and



assessment centers for entry-level promotional fire rank(s) to meet the specific needs of numerous protective service and public safety organizations. The exercises for these assessment centers were developed entirely by our staff, based on information derived from our job analysis efforts. We also conducted the administration of each of these assessment centers, including orientation to candidates, training of raters, designing and managing the actual assessment process (candidates performing the exercises), managing the assessment council scoring activities (raters arriving at final scores), and providing written feedback to candidates.

ASSESSMENT CENTERS

Morris & McDaniel officers have considerable experience in the design and implementation of state-of-the-art assessment centers for supervisory and managerial positions. Adding to this experience, Morris & McDaniel officers have developed programs and seminars on assessment methodology. Our projects have involved the use of multiple assessment techniques and exercises tailored to specific occupations and work settings, as well as multiple trained observers or assessors. Our work in assessment centers involves not only design and implementation, but also training seminars and professional lectures and articles. In many instances, because of the large number of candidates, innovations were used which included video-based situational exercises, multiple-choice formatted management exercises, and sometimes extensive use of video recordings to ease the administrative burdens associated with the use of assessors and large numbers of candidates.

EXAMINATION EXPERIENCE

Our approach in test development is collaborative. Based on the job analysis results, we shall make a recommendation of the types of assessments that are typically used to assess particular competencies and performance dimensions. We shall meet with the Police and Fire Departments and Civil Service Commission to review our proposed exam plan. We shall help City officials to evaluate their various options in light of time scheduling constraints, number of candidates to be assessed and budgetary constraints. We shall also discuss the return on investment of various options and utility considerations given relative validity evidence for the various assessments. For performance exercises and structured oral interviews/oral boards, our approach is similar to that used for assessment centers – very rigorous question development based on realistic scenarios often captured by critical incidents and comprehensive training for the raters/raters.

COMPUTER CAPABILITY

The offices of Morris & McDaniel utilize the most advanced and up to date computer technology for data analysis as well as other functions. These systems are maintained and supported by our in-house IT department to ensure maximum uptime and data security. Data analysis is performed with standard statistical applications software (e.g., SPSS), as well as with custom software written in-house. Data input is accomplished by scanning answer sheets compatible with any Scantron Series format, or NCS format, into our high-speed scanners.

We also have the capability of designing customized scannable answer sheets using Teleform software. Documents may also be input with page scanning and optical character recognition using our scanners. Documents and numerical data may be sent via e-mail or downloaded from our secure web servers by clients at their convenience. Additionally, data may be sent on media in the following formats: USB flash drive, DVD, or CD ROM. This allows for a wide range of input options. Output may be requested by, laser-printed form, USB flash drive, DVD, FTP, or on CD ROM.



Morris & McDaniel also uses advanced technology to facilitate productive project management. We have access to the Cisco WebEx system for Internet video conferencing. We also have the capability to deliver surveys online via commercial software products, and we use the latest in graphics software to assist with the presentation of project information and data.

LEGAL AND REGULATORY ISSUES

Morris & McDaniel is considered by many to be the leading firm in the nation for solving diversity issues for large protective services (fire/EMS, law enforcement and corrections) in their selection and promotional procedures.

Morris & McDaniel, Inc. has given expert opinions in federal courts on the interpretation of the Uniform Guidelines on Employee Selection Procedures. In addition to our activities in interpreting the Uniform Guidelines, Morris & McDaniel, Inc. officers have broadened these efforts by developing and presenting several conference seminars and courses for personnel managers, psychologists, and lawyers in the public and private sectors in the United States and in Great Britain. We have also published professional articles and contributed to books regarding the interpretation of the Uniform Guidelines. One staff member served on the Task Force of the Society of Industrial and Organizational Psychology to provide comments on possible revisions for the AERA, NCME, APA Standards for Educational and Psychological Tests.

EMPLOYMENT DISCRIMINATION LAW

Morris & McDaniel, Inc. is a firm of Industrial/Organizational Psychologists. The senior principal, also a licensed attorney, has expertise in employment discrimination law and has broad experience in Title VII litigation. This includes preparation of case materials, delivering depositions and expert testimony, conducting validation studies and statistical analyses of employment practices, and developing and implementing new personnel systems to comply with consent decrees. Our projects have included performing adverse impact analyses and evaluating employer compliance with legal and regulatory requirements. We have advised how to develop a legally defensible selection system, including the consideration of minimum qualifications. Morris & McDaniel, Inc. has also conducted several projects to develop and validate new selection procedures that comply with legal requirements and consent decrees.

INSURANCE

Morris & McDaniel, Inc. holds the following insurance coverage. Upon award of the contract, Morris & McDaniel, Inc. will agree to provide to City of Stamford, Connecticut a Certificate of Insurance naming the City as an Additional Insured on the face of the document.

Auto Liability	- \$1,000,000 any one accident
General Liability	- \$1,000,000 per occurrence
	- \$2,000,000 general aggregate
Workers Compensation	Statutory: Virginia and Mississippi
Coverage A	
Employer's Liability	- \$1,000,000 each accident
Coverage B	- \$1,000,000 disease policy limit
	- \$1,000,000 each employee
Excess/Umbrella Liability	- \$2,000,000 each occurrence aggregate
Errors and Omissions	- \$1,000,000 each wrongful act
	- \$3,000,000 aggregate





MORR&MC-01

OFARRIS

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

11/12/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Fisher Brown Bottrell Insurance, Inc. P. O. Box 1490 Jackson, MS 39215	CONTACT NAME:	
	PHONE (A/C, No, Ext): (601) 960-8200	FAX (A/C, No): (601) 208-7484
INSURED Morris and McDaniel, Inc. 117 South Saint Asaph Street Alexandria, VA 22314	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: The Travelers Indemnity Company of Connecticut	NAIC # 25682
	INSURER B: The Travelers Indemnity Company	25658
	INSURER C: Travelers Property Casualty Company of America	25674
	INSURER D: Travelers Casualty and Surety Company of America	31194
	INSURER E: Philadelphia Indemnity Insurance Company	18058
	INSURER F:	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			6607749A69A	7/12/2020	7/12/2021	EACH OCCURRENCE \$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000
							MED EXP (Any one person) \$ 10,000
							PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 2,000,000
							PRODUCTS - COMP/OP AGG \$ 2,000,000
							\$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			BA7076W806	7/12/2020	7/12/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
							BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 5,000			CUP7J23277A	7/12/2020	7/12/2021	EACH OCCURRENCE \$ 3,000,000
							AGGREGATE \$ 3,000,000
							\$
							\$
D	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input checked="" type="checkbox"/> Y <input type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below		Y/N Y N/A	UB3J438233	7/12/2020	7/12/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER
							E.L. EACH ACCIDENT \$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E	Prof. Errors & Omiss			PHSD1557613	7/12/2020	7/12/2021	Each Claim 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Professional Liability: \$2,000,000 Per Claim; \$3,000,000 Aggregate; \$100,000 Deductible

General Liability Policy contains Blanket Additional Insured & Blanket Waiver of Subrogation, wording as per written contract; Auto Liability Policy contains Blanket Additional Insured & Blanket Waiver of Subrogation wording as per written contract; Workers' Compensation contains Blanket Waiver of Subrogation wording as per written contract.

All coverage is subject to policy terms, conditions, and exclusions. 30 day notice of cancellation applies on all policies except 10 for non-payment of premium.

Re: RFP No. 814 Entry Level and Promotional Policy and Fire Examinations

CERTIFICATE HOLDER

CANCELLATION

City of Stamford
888 Washington Boulevard
Stamford, CT 06901

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

FORMS



Contractor's Statement

Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following:

If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or members:

Not Applicable

If a corporation, the names and addresses of all officers, and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% of the common or preferred stock of said holding company.

David M. Morris, Ph. D., J.D. 117 South Saint Asaph Street, Alexandria, Virginia 22314 80% Ownership

Joe F. Nassar, M.P.A. 53 Napa Valley Circle, Madison, MS 39110 20% Ownership

The names and positions of all persons listed hereinabove who are elected or appointed officers or employees of the City of Stamford.

N/A

Name of Bidder/Proposer: David M. Morris, Ph.D., J.D.

Signature of Bidder/Proposer: David M. Morris Ph.D., J.D.

Title: President

Company Name: Morris & McDaniel, Inc.

Address: 117 South Saint Asaph Street, Alexandria, Va 22314

Indicate if company submitting this proposal is: _____ MBE _____ WBE _____ DBE

Non-Collusion Affidavit

The undersigned, having been duly sworn, affirms and says that to the best of his/her knowledge and belief:

1. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proposer or with any competitor for the purpose of restricting competition.
2. Unless otherwise required by law, the prices, which have been quoted in this Proposal, have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly, to any other Proposer or to any competitor.
3. No attempt has been made or will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restricting competition.

Name of Proposer: Morris & McDaniel, Inc.

By: Joe F. Nassar, M.P.A.

Print Name: Joe F. Nassar, M.P.A.

Title: Vice-President

ACKNOWLEDGMENT

STATE OF Virginia

COUNTY OF Fairfax

SS. _____

Date: 12/07/2020

Personally appeared Joe F. Nassar, as Vice-President of the above named firm, and attested that the foregoing statements are true and accurate to the best of his/her knowledge and belief.



EXPIRATION DATE: 2/24/09

David M. Morris, PhD, JD.

Signature of Notary Public

My Commission Expires: 1/31/2023

David M. Morris, Ph.D., J.D.

City of Stamford
State of Connecticut Contractor Verification (in accordance with Public Act 16-67)

Compliance Affidavit

I, the undersigned, personally and on behalf of Morris & McDaniel, Inc., having
(Contractor)

been duly sworn, affirm and say that I have read, understand and am in compliance with Public Act 16-67 Concerning the Disclosure of Certain Education Personnel Records, Criminal Penalties for Threatening in Educational Settings and the Exclusion of a Minor's Name from Summary Process Complaints, and that neither I nor said Contractor, to the best of my knowledge, is in possession of any information indicating a finding of abuse or neglect or sexual misconduct, or otherwise have knowledge of such a condition(s) for any employees working on the project identified in RFQ/RFP or Bid S-814. Further, if I or said Contractor
(RFQ/RFP or Bid Number)

become aware of any information indicating such a finding, or otherwise gain knowledge of such a condition, I and/or said Contractor will immediately forward such information to the City of Stamford.

Contractor Name: Morris & McDaniel, Inc.

Street Address: 117 South Saint Asaph Street

City, State, Zip: Alexandria, Virginia 22314

Title of person completing this form: Vice- President

Signature: Joe F. Nassar

Printed Name: Joe F. Nassar, M.P.A.

Date: December 7, 2020

ACKNOWLEDGMENT

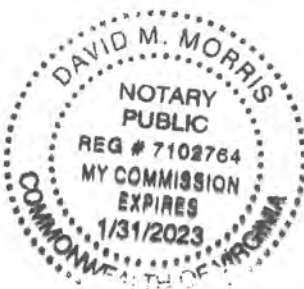
STATE OF Virginia

COUNTY OF Fairfax

SS. _____

Date: December 7, 2020

Personally appeared Joe F. Nassar, as Vice-President
of the above named Contractor, and attested that the foregoing statements are true and accurate to the best of his/her knowledge and belief on behalf of himself and said Contractor.



David M. Morris, Ph.D., J.D.
Signature of Notary Public

David M. Morris, Ph.D., J.D.

My Commission Expires: 1/31/2023

CERTIFICATE OF CORPORATE RESOLUTION
RFQ/RFP

I, Roger McMillin, SECRETARY OF Morris & McDaniel, Inc.
A CORPORATION EXISTING UNDER THE LAWS OF THE STATE OF Virginia, DO
HEREBY CERTIFY THAT THE FOLLOWING IS A TRUE COPY OF CERTAIN RESOLUTIONS
ADOPTED BY THE BOARD OF DIRECTORS OF SAID COMPANY, AT A MEETING THEREOF
DULY CALLED AND HELD ON THE 4th DAY OF December, 2020.

"RESOLVED, THAT THE President
OF THE CORPORATION BE AND IS HEREBY AUTHORIZED TO SIGN
A CONTRACT WITH THE CITY OF STAMFORD, CONNECTICUT FOR
Entry-Level & Promotional Police & Fire Examinations, RFP/RFQ No. 814."

I, FURTHER CERTIFY THAT, David M. Morris, Ph.D., J.D. IS THE DULY
ELECTED President OF Morris & McDaniel, Inc.
AND THE FOREGOING RESOLUTION HAS NOT BEEN MODIFIED OR REPEALED AND IS
IN FULL FORCE AND EFFECT.

IN WITNESS WHEREOF, I HAVE, HEREUNTO, SUBSCRIBED BY NAME AND AFFIXED
THE SEAL OF SAID CORPORATION THE 4th DAY OF December, 2020.



Roger McMillin
SECRETARY

CERTIFICATION AS TO CONTRACT SIGNATORY
For Limited Liability Companies (LLCs)
(Effective 9/1/2011)

I, _____ a _____ of _____,
(name of member or manager) (Member or Manager) (name of LLC)

LLC, a limited liability company organized and existing under the laws of the State of Connecticut (hereinafter the "Company"), hereby certify that:

1. that _____ is run by _____
(name of LLC) (Members or Managers)

2. that _____ is a _____ of _____
(name of contact signatory) (Member/Manager) (name of LLC)

and

3. that as such _____ is not prohibited from or
(name of Member/Manager who is contract signatory)
limited by the articles of organization from binding the LLC.

IN WITNESS HEREOF, the undersigned has affixed his/her signature this _____ day of

_____, 20_____.

(LLC Seal)

(Circle this L.S. if there is no seal)

Secretary (name of Secretary)

PROPOSER'S INFORMATION AND ACKNOWLEDGEMENT FORM

RFP No: 814 Entry Level and Promotional Police and Fire Examinations

Date: December 07, 2020

Proposer's Name: Morris & McDaniel, Inc.

Street Address: 117 South Saint Asaph Street

Alexandria, Virginia 22314

City State Zip

Business Telephone: 703-836-3600

Email: contact@morrisandmcdaniel.com

DUNS Number: 08-466-1842 Tax Id. No.: 64-0595753

Indicate (Yes/No) if company submitting this proposal is:

No MBE No WBE No DBE
(If yes, attach relevant certification)

Signature: David M. Morris Ph.D, J.D. Date: 12/07/2020

Printed Name: David M. Morris, Ph.D, J.D.

Title: President

Addenda Acknowledgement – check and note date of addendum

<input checked="" type="checkbox"/> Addenda No. 1 <u>11/16/2020</u>	<input checked="" type="checkbox"/> Addenda No. 2 <u>12/4/2020</u>
<input type="checkbox"/> Addenda No. 3	<input type="checkbox"/> Addenda No. 4
<input type="checkbox"/> Addenda No. 5	<input type="checkbox"/> Addenda No. 6
<input type="checkbox"/> Addenda No. 7	<input type="checkbox"/> Addenda No. 8
<input type="checkbox"/> Addenda No. 9	<input type="checkbox"/> Addenda No. 10
<input type="checkbox"/> Addenda No. 11	<input type="checkbox"/> Addenda No. 12

MAYOR
DAVID R. MARTIN



PURCHASING MANAGER
ERIK J. LARSON
Phone: (203) 977-4107
Email: elarson@stamfordct.gov

CITY OF STAMFORD
OFFICE OF ADMINISTRATION
888 WASHINGTON BOULEVARD
P.O. BOX 10152
STAMFORD, CONNECTICUT 06904-2152

ADDENDUM NO. 1
(November 16, 2020)
Request for Proposals No. 814
Entry Level and Promotional Police and Fire Examinations

Addendum No. 1 is being issued to all potential bidders to provide the items and attachments set forth herein which shall act to qualify, clarify, or otherwise modify the Contract Documents previously issued regarding the above referenced project. These items, whether of omission, addition, substitution, or clarification, shall be incorporated into the proposals submitted by all bidders, and receipt of this document and its attachments must be acknowledged, either in the space provided on the Bid Form or on the Contractor's Form of Proposal. Failure to do so may subject the Bidder to disqualification.

The items and references:

- The Scope of Services has been revised. Revision attached. These revisions replace pages 27-33 in the original RFP; the changes are highlighted in yellow.

Q1: What ranks will you be testing for and how many will be testing in each rank?

A1: Answers follow.

Q2: What resources do you want for the written exam? If they aren't selected yet, can you provide the resources utilized for the past two exams?

A2: The resources i.e., study materials for promotional are typically at least for Fire decided upon by the testing vendor and the Fire Chief(s). There is also a job analysis with subjects in ranks above the one that is being tested. Additionally there is an orientation that is provided by the vendor of the testing process; as well as a candidate handbook for the rank being tested. Also, the vendor works with the chiefs (Fire) to determine the content of the performance exercises.

Q3: What is the estimated date that you would like the test to occur? If it isn't specifically set, can you please provide an estimate?

A3: The CBA outlines the time period for study. In terms of scheduling, it really depends on the timing, the number of candidates, the availability of locations for testing.

Q4: Will you consider Police Promotional testing only for the bid without Fire testing or Entry level testing?

A4: NO

All other terms and conditions of **RFP No. 814** remain the same.

Erik J. Larson
Purchasing Agent

Cc: Vanesa Francis, Human Resources Generalist
Purchasing Department File

Scope of Services

The City of Stamford is soliciting proposals for the purpose of obtaining the services of a qualified examination consultant to provide and administer examinations for the below-listed job classifications. Note that the exam components mentioned below reflect past practice. The City welcomes proposals that offer additional exam components or alternatives to the exam components listed below. The tentative examination administration dates and anticipated number of applicants or maximum number possible are listed next to each title, as well as the type of exam to be conducted.

The City is open to awarding one, several, or even all these examination projects to one vendor, or to more than one vendor. The agreement shall become effective immediately upon the execution of an agreement by all parties and shall remain in effect for three (3) years from the date of signing. The City, at its option, may extend the engagement annually for two (2) additional option years.

Because the City does not know the exact number of candidates, assume that the fewest number anticipated will be tested and provide a per candidate price to be used if the number of candidates exceeds the minimum.

- A. Police Officer (entry level) – written and oral exams in the next three years and possibly the next four and five years. On or about 2021 and 2023. Anticipate at least 750 candidates.
- B. Police Sergeant (promotional) – written and an assessment or oral component. On or about 2021, 2022 and possibly 2023. Anticipate at least 100 candidates taking the written and fewer than that continuing to the other component(s).
- C. Police Lieutenant (promotional) - written and an assessment or oral component. On or about 2021, 2022 and possibly 2023. Anticipate at least 40 candidates taking the written and possibly fewer than that continuing to the other component(s).
- D. Police Captain (promotional) - written and an assessment or oral component. On or about 2021 and 2022 and possibly 2023. Anticipate at least 10 candidates taking the exam.
- E. Firefighter (entry level) - written and oral exams on or about 2021 and 2024. Anticipate at least 800 candidates.
- F. Fire Lieutenant (promotional) – written and an assessment or oral component. On or about 2021 and 2023. Anticipate at least 50 candidates taking the written exam and possibly fewer than that continuing to the other component(s).
- G. Fire Captain (promotional) – written and an assessment or oral component. On or about 2021 and 2023. Anticipate at least 50 candidates taking the written exam and possibly fewer than that continuing to the other component(s).
- H. Deputy Fire Chief (promotional) – written and an assessment or oral component. On or about 2021 and 2023. Anticipate at least 20 candidates.
- I. Fire Marshal (promotional) - written and an assessment or oral component. On or about 2021 and 2023. Anticipate at least 6 candidates taking the written exam, assessment or oral component.

- J. Assistant Fire Marshal (promotional) – written and an assessment or oral component. On or about 2021 and 2023. Anticipate at least 6 candidates taking the written exam, assessment or oral component.
- K. Deputy Fire Marshal (promotional) – written and an assessment or oral component. On or about 2021 and 2023. Anticipate at least 15 candidates taking the written exam, assessment or oral component.

Specifically, the Consultant shall perform the following tasks:

Provide, administer, score and report results for the examinations and, as required for promotional exams, respond to appeals of exam questions.

The City will afford the Consultant the option of being present when candidates review their exams so that the Consultant can keep control over the secure test content, if so desired.

Consultant Responsibilities:

Responsibilities of the selected Consultant(s) shall include, but not be limited to all relevant details as specified in the Scope of Services below. Upon entering a contract for services, the tasks enumerated under the Scope of Services below become part of the contract document.

Scope of Services – Enumerated Tasks:

1. Consultant will review job analysis data in determining the comprehensive range of aptitudes, skills, abilities and other traits that will identify candidates best suited to perform successfully in the position. Consultant will then determine if further data collection is necessary and implement procedures for collection of said data. The consultant will be required to follow the most appropriate validation strategy from those set forth in the Uniform Guidelines and the Principles for Validation.
2. Consultant will provide exam development of any/all products or services recommended as components appropriate for use in the selection process. Consultant shall be guided by the results of the job analysis process in developing all products and services.
3. In the event that the most appropriate method of examination includes more than one test component, the Consultant shall recommend a) whether a minimum or critical point of competency should be set for each test component and, if so, recommend the minimum or critical point of competency for each such component; b) the appropriate sequence of said tests including whether or not any such tests should utilize a compensatory scoring model or a multi-hurdle approach, and c) the most appropriate weights that should be allocated to each test. Said recommendations will be based on the results of the job analysis.
4. Consultant shall develop and provide appropriate candidate preparation resources and materials relative to all testing components of the selection process.

5. Consultant will provide any and all materials, written or otherwise, associated with any and all products or services recommended as components appropriate for use in the selection process. This may include, but not necessarily be limited to, printing of any and all exam materials, including answer sheets, with all appropriate security provided preventing unauthorized persons from having access; exam administration of any and all recommended components, instructions to candidates, all necessary supplies, supervision, distribution and collections of all exam materials and appropriate number of test monitors/proctors. Any and all examination components will be conducted on date(s) and time(s) agreed upon by Human Resources and the Consultant. Human Resources will be responsible for securing all necessary test sites.
6. In the use of a proposed oral exam, Consultant will seek, secure and train assessors in conducting and scoring the exam. Diversity within the assessor group in terms of race, age, gender and ethnicity will be required. Consultant must also provide orientation/training of the assessors. In an effort to mitigate the chances of assessor-to-candidate familiarity, Consultant is expected to recruit and provide assessors search. Consultant will be responsible for providing travel and all other expenses for assessors and should budget this item in the bid/proposal accordingly.
7. Consultant will score and analyze any and all test components utilizing scoring methodologies appropriate to each component and which reduce subgroup differences of each component used. Consultant shall also include a demographic analysis and a review for adverse impact following the 80% Rule of the Federal Guidelines for each component utilized. When the results conclude from a small number of cases, Consultant shall use the most appropriate statistical procedure to analyze results for adverse impact. Consultant shall submit a Technical Validation Report (as specified below) and then all scoring results and accompanying analyses to the City's Director of Human Resources along with a certified statement attesting to the accuracy of all said results.
8. Within 45 days of completion of the work on any exam project, the Consultant shall provide a technical report addressing the validity of the examination process. The validation report shall summarize the work done in the exam project. This report should be designed to address the guidelines/standards/principles in the following documents: (1) Uniform Guidelines on Employee Selection Procedures, (2) Standards for Educational and Psychological Testing (2014 edition), and (3) the Principles for the Validation and Use of Personnel Selection Procedures.

Said report must include, but is not limited to, the items listed below.

- a. Complete narratives of all work including a report on the job analysis and an explanation of the validity methodology used.
- b. A list of any and all subject matter experts, assessors and proctors used if used in any phase of the process.
- c. A summary of all scoring and rationale for the scoring models used in all components of the examination process, including all recommended cut points supporting minimum or critical points of competency.
- d. Adverse impact analyses in accordance with the Federal Uniform Guidelines, and through tests of significance.

- e. Any other information detailing the steps taken in the exam development, exam administration and exam scoring process to meet the requirements of the: (1) Uniform Guidelines on Employee Selection Procedures, (2) Standards for Educational and Psychological Testing (2014 edition), and (3) the Principles for the Validation and Use of Personnel Selection Procedures.
- 9. Based on method proposed by Consultant for an examination review process, Consultant shall provide whatever materials are necessary for the City to conduct a review at the conclusion of the examination process.
 - 10. Consultant must be prepared to defend all rendered test services and products in the event of a legal challenge. Consultant must also certify the accuracy of all submitted results by certifying to their accuracy in writing.
 - 11. Consultant shall provide brief written and/or oral feedback to candidates to help candidates understand their areas of strength and weakness.

Proposal Instructions:

The proposal itself shall be organized in the following format and information sequence:

- A. State full name and address of your organization. Provide a brief review of your organization, including experience in entry level and promotional Police and Fire testing. Include biographical data and credentials of principals of your organization and of individuals who will provide, administer, and score the exams and respond to appeals of questions on the promotional exams for the City of Stamford.
- B. List of all public safety entry level and promotional exam projects you have undertaken or completed in the past 5 years including: (1) name of jurisdiction, (2) name of job title(s) involved, (3) year(s) of exam project, (4) impact on protected classes (in terms of B-W effect size, that is the standardized difference between means or, if that is not available, the adverse impact in terms of appointments or, if that is not available, the adverse impact in terms of passing rates, if available), and (5) any legal challenge(s) to the project and resolution (if applicable). (You may, but are not required, to list promotional exam projects that go back more than 5 years.)
- C. Names and contact information for 5 references who are familiar with your entry level and promotional examination work and whom the City may contact.
- D. Outline of suggested possible components of the entry level and promotional Police and Fire exams and information on adherence to all required laws and professional practices concerning exam validity, reliability, and adverse impact.
- E. Scheduling availability for the anticipated exams and timelines for processing and reporting of exam results.
- F. Complete cost for each of the exams.

- G. Include any topics not covered in the Request for Proposals that you wish to disclose to the City which further describes your organization's level of qualification as an exam consultant.

A proposer who wishes to withdraw a Proposal must make the request in writing to the Purchasing Manager. Any correction or modification to a Proposal must be submitted in writing and in a sealed envelope clearly identifying the envelope as being a correction or modification to the proposer's Proposal.

Fee Proposal

Each proposal should include a detailed fee proposal for each examination. Fees should be presented, if applicable, in terms of per applicant cost and/or hourly rates. Out-of-pocket expenses should be listed and refer to specific tasks identified in the scope of work contained in this RFP. Additionally, a total figure should be included, including all hourly rates, expenses, overhead and other costs. Discounts offered for an award encompassing multiple examinations should be clearly stated.

Proposal Evaluation Process

Proposals will be evaluated by a Selection Committee comprised of representatives of the City of Stamford Law Department, Human Resources Division, Police Department, Fire and Rescue Department, and the Purchasing Manager. The Selection Committee will evaluate all proposals, and will select the proposals that best meet the City's requirements.

These firms may be asked to present their proposals to the Selection Committee, and/or to respond to questions. Based on the information provided in the proposal and any additional information presented, and using the evaluation criteria described below, a final selection will be made.

The City of Stamford reserves the right to reject any or all proposals submitted, to request additional information from any Proposer, and to negotiate with any of the Proposers regarding the terms of the engagement. The City of Stamford reserves its right to award this contract to more than one Proposer. The City of Stamford intends to select the firm that, in its opinion, best meets the City's needs, not necessarily the firm that proposes the lowest fees.

Evaluation Criteria

The following criteria will be used to evaluate proposals:

1. Examinations
 - a. Validity, reliability, and predicted level of effect and adverse impact on legally protected groups.
 - b. Ability of the proposed approach to identify well qualified candidates.
 - c. Ability of the proposed approach to allow for the promotion of a diverse workforce and to minimize adverse impact on legally protected classes.
 - d. Adherence to all relevant law and professional practices.

2. Proposed approach to examinations. Methodology, recommendations and implementation are all areas where the proposers' approaches will be evaluated.
3. General qualifications and experience of firm.
 - a. Firm's experience in providing entry level and promotional Police and Fire examinations to municipalities and/or governmental agencies in the last 5 years.
 - b. Firm's experience in providing entry level and promotional Police and Fire examinations, specifically to municipalities and /or governmental agencies in Connecticut in the last 5 years.
 - c. Experience and expertise of staff proposed to execute work for the City of Stamford.
4. Proposed fee arrangements, including cost in light of scope of services.

Other information for potential bidders:

1. There is NO requirement to set a passing point on tests or test components.
2. Video recording of oral exercises has been done for some previous exams.
3. Consultant is required to maintain all files concerning the test for 5 years or until the completion of any legal challenges, should there be any.
4. The City will send notice to candidates concerning when and where to appear to take the exam, based on direction from the consultant.



CITY OF STAMFORD
OFFICE OF ADMINISTRATION
888 WASHINGTON BOULEVARD
P.O. BOX 10152
STAMFORD, CONNECTICUT 06904-2152

ADDENDUM NO. 2
(December 4, 2020)
Request for Proposals No. 814
Entry Level and Promotional Police and Fire Examinations

Addendum No. 2 is being issued to all potential bidders to provide the items and attachments set forth herein which shall act to qualify, clarify, or otherwise modify the Contract Documents previously issued regarding the above referenced project. These items, whether of omission, addition, substitution, or clarification, shall be incorporated into the proposals submitted by all bidders, and receipt of this document and its attachments must be acknowledged, either in the space provided on the Bid Form or on the Contractor's Form of Proposal. Failure to do so may subject the Bidder to disqualification.

The items and references:

Entry-Level

Q: How long is your application period typically open?

A: Police 12 weeks. For Fire, the recruitment is done to accommodate the CPAT exam availability. Therefore, it may be 12-16 weeks.

Q: How long will the City allow for entry-level testing to be administered by the vendor prior to pulling eligibility lists?

A: The City does not request an eligibility list until the entry level testing has been completed.

Q: When does the City estimate testing will begin for police officer testing? Firefighter testing?

A: Fire Fall/ Winter FY 2021-2022

Q: Which testing vendors were used during the City's last entry-level police and fire screening process?

A: Morris and McDaniel

Q: What was the project cost during the last entry-level police and fire screening process?

A: Police 102,800 Fire \$102,000 approximate.

Q: How many firefighters does the City currently employ?

A: Approximately 252

Q: How many police officers does the City currently employ?

A: Approximately 285

Promotional

Q: When was the last job analysis done for each rank?

A: The job analysis was completed prior to the last exams.

Q: For the fire promotional assessment centers, do you typically have a tactical as one of the components? If yes, which ranks do a tactical?

A: Yes. Fire- all ranks. Police – Entry Level.

Q: How many panels of assessors were used for the previous fire marshal and Assistant fire chief assessment centers?

A: Unknown, this is managed by the test vendor.

Q: Do you have any department rules that each assessment center exercise has to be graded by different assessor panels?

A: Fire – No. Police – No.

Q: Does the consultant need to be present for the administration of the written exam?

A: Yes.

Q: When conducting the larger assessment centers, do you have a policy that all candidates need to be through an exercise in one day due to confidentiality concerns?

A: Yes or another assessment would need to be developed.

Q: How many days was the previous assessment center for the rank of fire lieutenant, fire captain and police sergeant?

A: Each was one day.

Q: How much did the city spend on the previous written exams and assessment centers for each promotional rank?

A: Police Sergeant \$72,950; Police Lieutenant \$43,840; Police Captain \$22,100.
Fire Lieutenant \$45,000 approximate; Fire Captain \$45,000 approximate; Deputy Fire Marshal \$28,300 approximate; Assistant Fire Marshal and Fire Marshal \$19,000 approximate; Deputy Fire Chief \$30,300 approximate.

Q: Will the City provide a facility for the assessment center administration?

A: Yes

Q: Do the assessment center assessors need to be from out of state?

A: No.

All other terms and conditions of **RFP No. 814** remain the same.

Erik J. Larson
Purchasing Agent

Cc: Vanesa Francis, Human Resources Generalist
Purchasing Department File

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

MORRIS & MCDANIEL, INC.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☒ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

117 SOUTH SAINT ASAPH STREET

Requester's name and address (optional)

6 City, state, and ZIP code

ALEXANDRIA, VA 22314

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

____ - ____ - ____

or

Employer identification number

6 4 - 0 5 9 5 7 5 3

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person ►

David M. Morris

Date ►

11-03-2020

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

COMMISSION ON HUMAN RIGHTS AND OPPORTUNITIES
CONTRACT COMPLIANCE REGULATIONS
NOTIFICATION TO BIDDERS

(Revised 09/3/15)

The contract to be awarded is subject to contract compliance requirements mandated by [Sections 4a-60](#) and [4a-60a](#) of the Connecticut General Statutes; and, when the awarding agency is the State, [Sections 46a-71\(d\)](#) and [46a-81i\(d\)](#) of the Connecticut General Statutes. There are Contract Compliance Regulations codified at [Section 46a-68j-21 through 43](#) of the Regulations of Connecticut State Agencies, which establish a procedure for awarding all contracts covered by [Sections 4a-60](#) and [46a-71\(d\)](#) of the Connecticut General Statutes.

According to [Section 46a-68j-30\(9\)](#) of the Contract Compliance Regulations, every agency awarding a contract subject to the contract compliance requirements has an obligation to “aggressively solicit the participation of legitimate minority business enterprises as bidders, contractors, subcontractors and suppliers of materials.” “Minority business enterprise” is defined in [Section 4a-60](#) of the Connecticut General Statutes as a business wherein fifty-one percent or more of the capital stock, or assets belong to a person or persons: “(1) Who are active in daily affairs of the enterprise; (2) who have the power to direct the management and policies of the enterprise; and (3) who are members of a minority, as such term is defined in subsection (a) of [Section 32-9n](#).” “Minority” groups are defined in [Section 32-9n](#) of the Connecticut General Statutes as “(1) Black Americans . . . (2) Hispanic Americans . . . (3) persons who have origins in the Iberian Peninsula . . . (4) Women . . . (5) Asian Pacific Americans and Pacific Islanders; (6) American Indians . . .” An individual with a disability is also a minority business enterprise as provided by [Section 4a-60g](#) of the Connecticut General Statutes. The above definitions apply to the contract compliance requirements by virtue of [Section 46a-68j-21\(11\)](#) of the Contract Compliance Regulations.

The awarding agency will consider the following factors when reviewing the bidder’s qualifications under the contract compliance requirements:

- (a) the bidder’s success in implementing an affirmative action plan;
- (b) the bidder’s success in developing an apprenticeship program complying with [Sections 46a-68-1 to 46a-68-17](#) of the Administrative Regulations of Connecticut State Agencies, inclusive;
- (c) the bidder’s promise to develop and implement a successful affirmative action plan;
- (d) the bidder’s submission of employment statistics contained in the “Employment Information Form”, indicating that the composition of its workforce is at or near parity when compared to the racial and sexual composition of the workforce in the relevant labor market area; and
- (e) the bidder’s promise to set aside a portion of the contract for legitimate minority business enterprises. [See Section 46a-68j-30\(10\)\(E\)](#) of the Contract Compliance Regulations.

INSTRUCTIONS AND OTHER INFORMATION

The following **[BIDDER CONTRACT COMPLIANCE MONITORING REPORT](#)** must be completed in full, signed, and submitted with the bid for this contract. The contract awarding agency and the Commission on Human Rights and Opportunities will use the information contained thereon to determine the bidders compliance to [Sections 4a-60](#) and [4a-60a](#) CONN. GEN. STAT., and [Sections 46a-68j-23](#) of the Regulations of Connecticut State Agencies regarding equal employment opportunity, and the bidder’s good faith efforts to include minority business enterprises as subcontractors and suppliers for the work of the contract.

1) Definition of Small Contractor

[Section 4a-60g](#) CONN. GEN. STAT. defines a small contractor as a company that has been doing business under the same management and control and has maintained its principal place of business in Connecticut for a one year period immediately prior to its application for certification under this section, had gross revenues not exceeding fifteen million dollars in the most recently completed fiscal year, and at least fifty-one percent of the ownership of which is held by a person or persons who are active in the daily affairs of the company, and have the power to direct the management and policies of the company, except that a nonprofit corporation shall be construed to be a small contractor if such nonprofit corporation meets the requirements of subparagraphs (A) and (B) of subdivision [4a-60g](#) CONN. GEN. STAT.

2) Description of Job Categories (as used in Part IV Bidder Employment Information) (Page 2)

MANAGEMENT: Managers plan, organize, direct, and control the major functions of an organization through subordinates who are at the managerial or supervisory level. They make policy decisions and set objectives for the company or departments. They are not usually directly involved in production or providing services. Examples include top executives, public relations managers, managers of operations specialties (such as financial, human resources, or purchasing managers), and construction and engineering managers.

BUSINESS AND FINANCIAL OPERATIONS: These occupations include managers and professionals who work with the financial aspects of the business. These occupations include accountants and auditors, purchasing agents, management analysts, labor relations specialists, and budget, credit, and financial analysts.

MARKETING AND SALES: Occupations related to the act or process of buying and selling products and/or services such as sales engineer, retail sales workers and sales representatives including wholesale.

LEGAL OCCUPATIONS: In-House Counsel who is charged with providing legal advice and services in regards to legal issues that may arise during the course of standard business practices. This category also includes assistive legal occupations such as paralegals, legal assistants.

COMPUTER SPECIALISTS: Professionals responsible for the computer operations within a company are grouped in this category. Examples of job titles in this category include computer programmers, software engineers, database administrators, computer scientists, systems analysts, and computer support specialists

ARCHITECTURE AND ENGINEERING: Occupations related to architecture, surveying, engineering, and drafting are included in this category. Some of the job titles in this category include electrical and electronic engineers, surveyors, architects, drafters, mechanical engineers, materials engineers, mapping technicians, and civil engineers.

OFFICE AND ADMINISTRATIVE SUPPORT: All clerical-type work is included in this category. These jobs involve the preparing, transcribing, and preserving of written communications and records; collecting accounts; gathering and distributing information; operating office machines and electronic data processing equipment; and distributing mail. Job titles listed in this category include telephone operators, bill and account collectors, customer service representatives, dispatchers, secretaries and administrative assistants, computer operators and clerks (such as payroll, shipping, stock, mail and file).

BUILDING AND GROUNDS CLEANING AND MAINTENANCE: This category includes occupations involving landscaping, housekeeping, and janitorial services. Job titles found in this category include supervisors of landscaping or housekeeping, janitors, maids, grounds maintenance workers, and pest control workers.

CONSTRUCTION AND EXTRACTION: This category includes construction trades and related occupations. Job titles found in this category include boilermakers, masons (all types), carpenters, construction laborers, electricians, plumbers (and related trades), roofers, sheet metal workers, elevator installers, hazardous materials removal workers, paperhangers, and painters. Paving, surfacing, and tamping equipment operators; drywall and ceiling tile installers; and carpet, floor and tile installers and finishers are also included in this category. First line supervisors, foremen, and helpers in these trades are also grouped in this category.

INSTALLATION, MAINTENANCE AND REPAIR: Occupations involving the installation, maintenance, and repair of equipment are included in this group. Examples of job titles found here are heating, ac, and refrigeration mechanics and installers; telecommunication line installers and repairers; heavy vehicle and mobile equipment service technicians and mechanics; small engine mechanics; security and fire alarm systems installers; electric/electronic repair, industrial, utility and transportation equipment; millwrights; riggers; and manufactured building and mobile home installers. First line supervisors, foremen, and helpers for these jobs are also included in the category.

MATERIAL MOVING WORKERS: The job titles included in this group are Crane and tower operators; dredge, excavating, and lading machine operators; hoist and winch operators; industrial truck and tractor operators; cleaners of vehicles and equipment; laborers and freight, stock, and material movers, hand; machine feeders and offbearers; packers and packagers, hand; pumping station operators; refuse and recyclable material collectors; and miscellaneous material moving workers.

PRODUCTION WORKERS: The job titles included in this category are chemical production machine setters, operators and tenders; crushing/grinding workers; cutting workers; inspectors, testers sorters, samplers, weighers; precious stone/metal workers; painting workers; cementing/gluing machine operators and tenders; etchers/engravers; molders, shapers and casters except for metal and plastic; and production workers.

3) Definition of Racial and Ethnic Terms (as used in Part IV Bidder Employment Information) (Page 3)

White (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.

Black (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa.

Hispanic- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

Asian or Pacific Islander- All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes China, India, Japan, Korea, the Philippine Islands, and Samoa.

American Indian or Alaskan Native- All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.

BIDDER CONTRACT COMPLIANCE MONITORING REPORT

PART 1 – Bidder Information

Company Name: Morris & McDaniel, Inc. Street Address: 117 South Saint Asaph Street City & State: Alexandria Virginia Chief Executive: David M. Morris	Bidder Federal Employer 64-0595753 Identification Number: Or Social Security Number:
Major Business Activity: We are a firm of Industrial and Organizational Psychologists providing the development, scoring, administration, validation and defense of entry-level and promotional examinations for public safety occupations. Our experience includes a broad range of personnel management and personnel screening and vetting to local, state, and federal government agencies, as well as to private industry. Our organization provides research and consulting expertise that combines behavioral science principles with statistical analysis and a practical	Bidder Identification (response optional/definitions on page 1) -Bidder is a small contractor? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> -Bidder is a minority business enterprise? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> (If yes, check ownership category) Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian American <input type="checkbox"/> American Indian/Alaskan Native <input type="checkbox"/> Iberian Peninsula <input type="checkbox"/> Individual(s) with a Physical Disability <input type="checkbox"/> Female <input type="checkbox"/> -Bidder is certified as above by State of CT? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Bidder Parent Company: N/A (If any)	
Other Locations in CT: N/A (If any)	

PART II - Bidder Nondiscrimination Policies and Procedures

1. Does your company have a written Affirmative Action/Equal Employment Opportunity statement posted on company bulletin boards? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	7. Do all of your company contracts and purchase orders contain non-discrimination statements as required by Sections 4a-60 & 4a-60a Conn. Gen. Stat.? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
2. Does your company have the state-mandated sexual harassment prevention in the workplace policy posted on company bulletin boards? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	8. Do you, upon request, provide reasonable accommodation to employees, or applicants for employment, who have physical or mental disability? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
3. Do you notify all recruitment sources in writing of your company's Affirmative Action/Equal Employment Opportunity employment policy? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	9. Does your company have a mandatory retirement age for all employees? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
4. Do your company advertisements contain a written statement that you are an Affirmative Action/Equal Opportunity Employer? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your supervisors? Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input checked="" type="checkbox"/>
5. Do you notify the Ct. State Employment Service of all employment openings with your company? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	11. If your company has apprenticeship programs, do they meet the Affirmative Action/Equal Employment Opportunity requirements of the apprenticeship standards of the Ct. Dept. of Labor? Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input checked="" type="checkbox"/>
6. Does your company have a collective bargaining agreement with workers? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	12. Does your company have a written affirmative action Plan? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If no, please explain.
6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers? Yes <input type="checkbox"/> No <input type="checkbox"/>	
6b. Have you notified each union in writing of your commitments under the nondiscrimination requirements of contracts with the state of CT? Yes <input type="checkbox"/> No <input type="checkbox"/>	13. Is there a person in your company who is responsible for equal employment opportunity? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If yes, give name and phone number: Roger McMillin 703-944-8154

1. Will the work of this contract include subcontractors or suppliers? Yes ☐ No ☒

1a. If yes, please list all subcontractors and suppliers and report if they are a small contractor and/or a minority business enterprise. (defined on page 1 / use additional sheet if necessary)

N/A

1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? Yes ☐ No ☒

PART IV - Bidder Employment Information

Date: December 07, 2020

JOB CATEGORY *	OVERALL TOTALS	WHITE (not of Hispanic origin)		BLACK (not of Hispanic origin)		HISPANIC		ASIAN or PACIFIC ISLANDER		AMERICAN INDIAN or ALASKAN NATIVE	
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Management Professionals	10	4	5				1				
Business & Financial Ops											
Marketing & Sales Staff Consultants	6	1	5								
Legal Occupations											
Computer Specialists	2	2									
Architecture/Engineering											
Office & Admin Support	6		5		1						
Bldg/ Grounds Cleaning/Maintenance	1			1							
Construction & Extraction											
Installation, Maintenance & Repair											
Material Moving Workers											
Production Occupations											
TOTALS ABOVE	25	7	15	1	1		1				
Total One Year Ago	25	7	15	1	1		1				
FORMAL ON THE JOB TRAINEES (ENTER FIGURES FOR THE SAME CATEGORIES AS ARE SHOWN ABOVE)											
Apprentices											
Trainees											

*NOTE: JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)

1. Which of the following recruitment sources are used by you? (Check yes or no, and report percent used)				2. Check (X) any of the below listed requirements that you use as a hiring qualification (X)		3. Describe below any other practices or actions that you take which show that you hire, train, and promote employees without discrimination We believe that a diverse workforce strengthens our ability to excel in our chosen field. We work in a segment of human resource management where considerations of diversity constitute one the primary components of a successful hiring or promotional process. In all of our solicitations seeking new employees for our organization, we emphasize the cornerstone proposition that we are committed to a diverse workforce. We make actual hiring decisions with those same criteria as an important consideration in the selection decision.
SOURCE	YES	NO	% of applicants provided by source			
State Employment Service	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5%	X	Work Experience	
Private Employment Agencies	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Ability to Speak or Write English	
Schools and Colleges	<input checked="" type="checkbox"/>	<input type="checkbox"/>	85%	X	Written Tests	
Newspaper Advertisement	<input type="checkbox"/>	<input checked="" type="checkbox"/>			High School Diploma	
Walk Ins	<input type="checkbox"/>	<input checked="" type="checkbox"/>		X	College Degree	
Present Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10%		Union Membership	
Labor Organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Personal Recommendation	
Minority/Community Organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Height or Weight	
Others (please identify)	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Car Ownership	
	<input type="checkbox"/>	<input type="checkbox"/>			Arrest Record	
	<input type="checkbox"/>	<input type="checkbox"/>			Wage Garnishments	

Certification (Read this form and check your statements on it CAREFULLY before signing). I certify that the statements made by me on this BIDDER CONTRACT COMPLIANCE MONITORING REPORT are complete and true to the best of my knowledge and belief, and are made in good faith. I understand that if I knowingly make any misstatements of facts, I am subject to be declared in non-compliance with Section 4a-60, 4a-60a, and related sections of the CONN. GEN. STAT.

(Signature) <i>David M. Moris</i>	(Title) President	(Date Signed) 12/7/2020	(Telephone) 703-836-3600
--------------------------------------	----------------------	----------------------------	-----------------------------

APPENDICES



APPENDIX A

**Release by the City of New York Stating
Morris & McDaniel as only Consultant that
Assists in all their Testing Including New
York PD**





**Citywide Administrative
Services**

Lisette Camilo
Commissioner

Merside Ibric
Acting Deputy Commissioner Office of Citywide Procurement

The David N. Dinkins Municipal Building
1 Centre Street
New York, NY 10007

212 386 6311 tel
nyc.gov/dcas

DATE: APRIL 4, 2017

TO: To: 'dwinrich@psionline.com' <dwinrich@psionline.com>; 'TCollins@psionline.com' <TCollins@psionline.com>; 'jennifer.cerciello@pearson.com' <jennifer.cerciello@pearson.com>; 'Peter@aptask.com' <Peter@aptask.com>; 'breana@bonova.net' <breana@bonova.net>; 'LAnderson@HumRRO.org' <LAnderson@HumRRO.org>; 'hnguyen@air.org' <hnguyen@air.org>; Joe Nassar <joe@morrisandmcdaniel.com>; 'gbarrett@barrett-associates.com' <gbarrett@barrett-associates.com>; 'mmcpheil@valtera.com' <mmcpheil@valtera.com>; 'dmcleod@capstonestrategygroup.com' <dmcleod@capstonestrategygroup.com>; 'Anderson@HumRRO.org' <Anderson@HumRRO.org>; 'mmihalecz@psionline.com' <mmihalecz@psionline.com>; 'KHANS@CRESERVICESINC.COM' <KHANS@CRESERVICESINC.COM>; 'info@drchengzhu.com' <info@drchengzhu.com>; 'shanep@pmglc.com' <shanep@pmglc.com>; 'janet.echemendia@ebjacobs.com' <janet.echemendia@ebjacobs.com>; 'dwinrich@psionline.com' <dwinrich@psionline.com>; 'dmcleod@capstonestrategygroup.com' <dmcleod@capstonestrategygroup.com>; Glenna Allen <glenna@morrisandmcdaniel.com>; 'BIDWATCH@CENTERDIGITALGOV.COM' <BIDWATCH@CENTERDIGITALGOV.COM>; 'RCVRF@MGTAMER.COM' <RCVRF@MGTAMER.COM>; 'DIAMONDSPOWER@MSN.COM' <DIAMONDSPOWER@MSN.COM>; 'PROPRESOURCE@AIR.ORG' <PROPRESOURCE@AIR.ORG>; 'PDVAVES@THEPUBLICGOOD-NYC.COM' <PDVAVES@THEPUBLICGOOD-NYC.COM>; 'VGREMELSBACKER@PTCNY.COM' <VGREMELSBACKER@PTCNY.COM>; 'SHANEP@PMGLC.COM' <SHANEP@PMGLC.COM>; 'KELLY.MCINTYRE@BOOTHRESEARCHGROUP.COM' <KELLY.MCINTYRE@BOOTHRESEARCHGROUP.COM>; 'LAURIE.ZELESNIKAR@PDRI.COM' <LAURIE.ZELESNIKAR@PDRI.COM>; 'DFRANCO@SEGALCO.COM' <DFRANCO@SEGALCO.COM>; David Morris <morrisd@morrisandmcdaniel.com>; 'MARYAP@DEP.NYC.GOV' <MARYAP@DEP.NYC.GOV>; 'LAURIE@PRIME-VENDOR.COM' <LAURIE@PRIME-VENDOR.COM>; 'DMCLEOD@CAPSTONESTRATEGYGROUP.COM' <DMCLEOD@CAPSTONESTRATEGYGROUP.COM>; 'KDOUCET@PROEXAM.ORG' <KDOUCET@PROEXAM.ORG>; 'TERRI.DUNBAR@PEARSON.COM' <TERRI.DUNBAR@PEARSON.COM>; 'GBS@BIDNET.COM' <GBS@BIDNET.COM>; 'MP@SREYO.COM' <MP@SREYO.COM>; 'JSCAMURRA@TTACORP.COM' <JSCAMURRA@TTACORP.COM>; 'JWIESEN@APPLIEDPERSONNELRESEARCH.COM' <JWIESEN@APPLIEDPERSONNELRESEARCH.COM>; 'BULLAYSHAHINC@GMAIL.COM' <BULLAYSHAHINC@GMAIL.COM>; 'DP@DONIAA.COM' <DP@DONIAA.COM>; 'bhasyakarulu@gmail.com' <bhasyakarulu@gmail.com>; 'SourceManagement2@onvia.com' <SourceManagement2@onvia.com>; Mohammed Belarrem (DCAS) <mbelarrem@dcas.nyc.gov>; 'bidsinbound@deltek.com' <bidsinbound@deltek.com>; 'elizabeth.sexton@northhighland.com' <elizabeth.sexton@northhighland.com>; 'marketing2@dackconsulting.com' <marketing2@dackconsulting.com>; 'info@bruteforcesolution.com' <info@bruteforcesolution.com>; 'news@nyiha.org' <news@nyiha.org>; 'tosha.miller@nycbcc.org' <tosha.miller@nycbcc.org>; 'lyra@napc.me' <lyra@napc.me>; 'mallory302@gmail.com' <mallory302@gmail.com>; 'office@forensicsfoundations.com'



<office@forensicfoundations.com>; 'rconover@wisengineering.com' <rconover@wisengineering.com>;
'daveseliger@gmail.com' <daveseliger@gmail.com>; 'ansump@oathinc.com' <ansump@oathinc.com>;
'breana@bonova.net' <breana@bonova.net>; 'ajordan@onesourcesbc.com' <ajordan@onesourcesbc.com>;
'kenneth.bruskiewicz@pdri.com' <kenneth.bruskiewicz@pdri.com>; 'allisonschulhof@maximus.com'
<allisonschulhof@maximus.com>; 'laurensalomon@peopleadvantage.net'
<laurensalomon@peopleadvantage.net>; 'sales@jobaps.com' <sales@jobaps.com>;
'amule@amtexsystems.com' <amule@amtexsystems.com>; 'janine@jasleadership.com'
<janine@jasleadership.com>; 'dtafelski@edsolutions.com' <dtafelski@edsolutions.com>;
'spriya@saptanet.com' <spriya@saptanet.com>; 'tcollins@psionline.com' <tcollins@psionline.com>;
'proposals@humro.org' <proposals@humro.org>; 'info@drchengzhu.com' <info@drchengzhu.com>;
'sue.kim@ebjacobs.com' <sue.kim@ebjacobs.com>; 'susank@panix.com' <susank@panix.com>;
'jay.floersch@Aonhewitt.com' <jay.floersch@Aonhewitt.com>; 'CATkinson@biddle.com'
<CATkinson@biddle.com>; 'don_bunch@us.ibm.com' <don_bunch@us.ibm.com>; 'sdawson@cpshr.us'
<sdawson@cpshr.us>
Cc: Barbara Dannenberg (DCAS) <bdannenberg@dcas.nyc.gov>; Andrea Valentine (DCAS)
<AValentine@dcas.nyc.gov>; Stephen Stamo (DCAS) <sstamo@dcas.nyc.gov>; Ozgur Manuka (DCAS)
<omanuka@dcas.nyc.gov>

**RE: ADDENDUM #2 TO THE REQUEST FOR PROPOSALS FOR DCAS JOB ANALYSES AND
CIVIL SERVICE EXAMS E-PIN: 85617P0001**

The Department of Citywide Administrative Services ("DCAS") is issuing the following as Addendum #2 to the above-referenced Request for Proposals ("RFP"):

This addendum includes the following information:

Section I: Proposal Submission Revised Due Date and Time Section II: Questions &
Answers
Section III: Changes to Attachment B

Question #17: Can you please share the incumbent's name?

Response: DCAS currently has one vendor, **Morris and McDaniel, Inc.**, providing services in job analyses and civil service exams development. Any further detail in connection with the current contract can be requested by submitting a Foil Request to the Agency by e-mailing at foilrequest@dcas.nyc.gov.



APPENDIX B

DCAS A+ Rating by The City Of New York





☆ Questionnaire : Campaign - Renewal of Job Analysis, Testing, Development & Scori

Search ...



Dispute Accept

Label : Campaign - Renewal of Job Analysis, Testing, Development & Scori Evaluation Period Begin Date : 10/15/2016

Description : Evaluation Period End Date : 10/15/2017

Status : Vendor Review

Excellent

Excellent >80-100
Good >60-80
Satisfactory >40-60
Poor >20-40
Unsatisfactory 0-20

Category / Subcategory	Score
Timeliness of Performance	100
Fiscal Administration and Accountability	100
Performance and Overall Quality	100

EVALUATIONS ▾

Label	Status	Score
Campaign - Renewal of Job Analysis, Testing, Development & Scori	Approved	100

1 Result(s)



☆ Questionnaire : Campaign - Renewal of Job Analysis, Testing, Development & Scoring

Label : Campaign - Renewal of Job Analysis, Testing, Development & Scoring
Description :
Status : Vendor Review

Excellent

Category / Subcategory
Timeliness of Performance
Fiscal Administration and Accountability
Performance and Overall Quality

EVALUATIONS

Label
Campaign - Renewal of Job Analysis, Testing, Development & Scoring
1 Result(s)

Evaluation : Campaign - Renewal of Job Analysis, Testing, Development & Scoring

Close

was the contract work completed on time, and if ongoing, is the vendor appropriately adhering to schedules and milestones attached to producing deliverables including, but not limited to, reports, audits, schedules, designs or studies?

Performance and Overall Quality
100%

Answer : ☒ Yes
☐ No

Question 1.2
If the vendor was given any extensions of time, were any such extensions reasonable?

1.00

Answer : ☒ Yes
☐ No

Question 1.3
Were any unreasonable delays in the contract work caused by the vendor or any of its subcontractor(s)?

2.00

Answer : ☐ Yes
☒ No

Question 1.4
If applicable, was the vendor timely in obtaining approvals from regulatory agencies?

1.00

Answer : ☒ Yes
☐ No

Timeliness of Performance Rating

Answer : ☒ Excellent
☐ Good
☐ Satisfactory
☐ Poor
☐ Unsatisfactory

Comment : All deliverables were received in a timely manner.

100.00

APPENDIX C

Response to Florida Department of Law Enforcement's Proposed Remedial Measures Regarding Law Enforcement Basic Abilities Professional





U.S. Department of Justice

Office of Justice Programs

Office for Civil Rights

Washington, D.C. 20531

VIA E-MAIL AND FIRST-CLASS MAIL

December 28, 2015

Richard L. Swearingen
Commissioner
Florida Department of Law Enforcement
Post Office Box 1489
Tallahassee, Florida 32302-1489

Re: Response to Fla. Dep't of Law Enforcement's Proposed Remedial Measures
Regarding Law Enforcement Basic Abilities Test (15-OCR-0783)

Dear Commissioner Swearingen:

I acknowledge receipt of your November 20, 2015, letter to the Office for Civil Rights (OCR), Office of Justice Programs, U.S. Department of Justice (DOJ), in which you respond to the OCR's October 23, 2015, letter identifying concerns and recommendations regarding the Florida Department of Law Enforcement's (FDLE) Law Enforcement Basic Abilities Test (LE BAT). We appreciate the FDLE's willingness to work cooperatively with the OCR to develop a nondiscriminatory process for determining who may enter a training academy in Florida, consistent with the Omnibus Crime Control and Safe Streets Act of 1968 (Safe Streets Act). In the instant letter, we address the FDLE's response and ask the FDLE to respond to additional recommendations and requests for information.

I. Proposed Changes to I/O Solutions, Inc. LE BAT Exam

In the OCR's October 23, 2015, letter, we concluded that the I/O Solutions, Inc. (I/O Solutions) LE BAT exam had a disparate impact on African Americans and Hispanics when evaluated as the pass/fail device it is intended to be, and that the Miami Dade College and Morris & McDaniel, Inc. (Morris & McDaniel) LE BATs were less discriminatory alternatives to the I/O Solutions exam. To address the OCR's concerns about the FDLE's continued reliance on the I/O Solutions exam, and after consulting with I/O Solutions, the FDLE proposed two changes to that exam. First, I/O Solutions could change the pass point of the exam to a scaled score of 70, which, according to I/O Solutions' analysis, would reduce the impact of the pass/fail use of its test while maintaining the test's validity. This change would apply retroactively and prospectively. Second, I/O Solutions could remove certain items from its LE BAT test forms that disproportionately affect African-American and Hispanic test takers, which would reduce the impact of the examination and, based on the results of I/O Solutions' test of this proposal on one of its exam forms, actually improve the validity of the test. This change would apply prospectively. On December 1, 2015, in a conversation between OCR Attorney Advisor

Christopher Zubowicz and FDLE Training and Research Manager Roy Gunnarsson, the OCR notified the FDLE that it agreed to both proposed changes. In a December 17, 2015, e-mail to Mr. Zubowicz, Mr. Gunnarsson stated that I/O Solutions likely could begin using the revised test forms by February 1, 2016.

To assist the OCR in monitoring the FDLE's and I/O Solutions' implementation of these remedial measures, please undertake the following actions:

- No. 1: Please identify the effective date of the pass-point change to I/O Solutions' LE BAT exam; and
- No. 2: Please send to the OCR a draft of the letter the FDLE plans to send to each candidate who secured a passing score on the LE BAT since June 1, 2010, under I/O Solutions' new pass point, irrespective of whether that candidate had also obtained a passing score on the LE BAT during this time frame under I/O Solutions' prior pass point. We will provide feedback on that draft letter and may seek additional information about the recipients of the final version of the letter. The FDLE should send the final version of the letter by mail and by e-mail, to the extent I/O Solutions has both types of contact information for an examinee.

In describing I/O Solutions' pass-point change on its LE BAT exam, the FDLE noted that the Criminal Justice Standards and Training Commission (Commission) will need to grant a waiver to examinees who will learn they passed the test but who took the test more than four years ago.

- No. 3: Please identify how long an examinee will be able to use a passing score, if the Commission grants him or her a waiver.
- No. 4: Please describe what, if any, steps the FDLE can take to facilitate the waiver process for affected examinees.

II. Reducing the Risk That Law Enforcement Agencies Use the LE BAT Exam Scores for Selection Purposes Other Than Pass/Fail

In the OCR's October 23, 2015, letter, we also expressed concern that law enforcement agencies in Florida may be misusing the LE BAT by relying on actual scores from the test, rather than solely pass/fail results, to make employment decisions. In response to this concern, the FDLE proposed adding the following disclaimer to LE BAT test takers' grade reports:

"Disclaimer: This is an UNOFFICIAL copy and is not valid for employment purposes. Official documentation of the Basic Abilities Test can be found in the Automated Training Management System (ATMS). In addition, this information has not been validated by FDLE for any employment decisions. FDLE will not support any decisions made based on any BAT data other than an official pass/fail grade as determined by the Department."

The OCR agrees that the FDLE should add a disclaimer to LE BAT test takers' grade reports, and offers the following redline revision to the FDLE's proposed disclaimer language:

"Disclaimer: This is an UNOFFICIAL copy and is not valid for employment purposes. Official documentation of the Basic Abilities Test can be found in the Automated Training Management System (ATMS). In addition, this information has not been validated by FDLE for any employment decisions. FDLE will not support any decisions made based on any BAT data other than an official pass/fail grade as determined by ~~FDLE~~the Department.

- No. 5: Please notify the OCR whether the FDLE is amenable to our proposed revision.
- No. 6: Please notify the OCR when the FDLE will add a final version of the disclaimer to LE BAT test takers' grade reports.

While the FDLE's implementation of the above proposal is important, it is not sufficient to address the OCR's concerns that law enforcement agencies in Florida misuse the LE BAT. First, I/O Solutions' response to the OCR's inquiry states on page 36 that "agencies within the state commonly use the result to the FDLE FL-BAT program to make rank-ordered hiring decisions."¹ Second, just last month, the OCR learned that the Florida Highway Patrol (FHP) improperly uses the LE BAT for employment purposes, and actually touts its misuse of the LE BAT as an effective tool for hiring entry-level troopers. In the November 2015 issue of *Police Chief* magazine, a representative from the FHP wrote an article that purported to describe the relationship between troopers' scores on the LE BAT and their subsequent performance as trooper recruits at the FHP's academy.² Of course, as the FDLE knows, the LE BAT vendors did not validate their exams for this use, and the author never suggests that the FHP commissioned its own validity study on using actual test scores to select and hire entry-level troopers. Moreover, as I/O Solutions' response to the OCR's inquiry makes clear, a particular score does not even reflect the same level of performance across LE BAT tests. At the end of the article, after relying on a methodologically unsound analysis to conclude that LE BAT scores predict trooper recruit performance at the FHP's academy, the author recommends that the FHP "generally[] give preference to candidates with higher BAT scores."³

The OCR is troubled by the FHP's improper reliance on the LE BAT and its public contention that it should rely on actual test scores for employment purposes. We are especially concerned that leaders at other law enforcement agencies in Florida who are not already misusing the LE BAT may now think, having read this article, that they too should rely on actual LE BAT scores to screen applicants for law enforcement positions.

¹ IOS, Inc., *A Response to the Department of Justice Inquiry into the use of the Criminal Justice Officer Basic Abilities Test – CJBAT within the State of Florida* 36 (2015).

² Suzanne Steel-Claridge, *Selecting In Recruits: Identifying Traits and Characteristics Indicative of Florida Highway Patrol Training Academy Success*, POLICE CHIEF, Nov. 2015, <http://bit.ly/1QpfWX9>.

³ *Id.*

To address this ongoing challenge, the FDLE should undertake the following actions:

- No. 7: No longer permit I/O Solutions, Miami Dade College, and Morris & McDaniel to disclose actual LE BAT scores to examinees, instead providing only the candidate's pass/fail result. As you may recall, the OCR made a similar recommendation in its October 23, 2015, letter to the FDLE. The FDLE did not adopt this recommendation, asserting that examinees can obtain their LE BAT scores through public records requests. Accepting, for now, the accuracy of this interpretation of Florida's public records laws, the OCR has concerns with this approach because it unnecessarily facilitates examinees' access to their actual test scores. Given our concerns about misuse of the LE BAT, the FDLE should not make it easier for examinees to obtain their scores and to provide them to agencies when they apply for a law enforcement officer position. The FDLE should reconsider its position on this recommendation. Once the FDLE works with the LE BAT vendors to implement this recommendation, it should send a letter to law enforcement agencies in Florida about the new system for reporting LE BAT results, the instant matter, the proper use of the LE BAT (*i.e.*, as a pass/fail screening tool), and improper uses of the LE BAT (*e.g.*, using actual scores to rank order applicants). The FDLE should send a draft of this letter to the OCR for review.
- No. 8: Ask I/O Solutions, Miami Dade College, and Morris & McDaniel to provide the FDLE with the names of those law enforcement agencies that they know or have a strong reason to believe use actual LE BAT scores to rank order applicants for law enforcement positions. The FDLE should provide to the OCR any responses it receives to this information request.
- No. 9: Notify subrecipients of the DOJ's Justice Assistance Grant (JAG) Program that they should not utilize actual LE BAT scores to make employment decisions. As you know, the FDLE is the state administering agency (SAA) for the JAG Program, and as such, it has an obligation to monitor the compliance of its subrecipients with the nondiscrimination requirements of the Safe Streets Act and its regulations.⁴ Recognizing this requirement, the FDLE developed the attached "methods of administration" (MOA) for conducting subrecipient monitoring. The MOA describes, among other things, how the FDLE ensures that subrecipients do not engage in prohibited employment discrimination. Consistent with this monitoring obligation, the FDLE should send a letter to current JAG Program subrecipients about the instant matter, the proper use of the LE BAT (*i.e.*, as a pass/fail screening tool), improper uses of the LE BAT (*e.g.*, using actual scores to rank order applicants), and their nondiscrimination and equal employment opportunity obligations under the Safe Streets Act and its regulations. The FDLE should send a draft of this letter to the OCR for review.
- No. 10: Evaluate, as part of its civil rights oversight program, whether JAG Program subrecipients misuse the LE BAT by using actual scores to rank order candidates. As

⁴ See Fla. Dep't of Law Enforcement, No. 09-OCR-0058, Office for Civ. Rts. Compl. Rev. Rep. (U.S. Dep't of Justice July 31, 2009), <http://1.usa.gov/1QjIOTD>; *Civil Rights Compliance Specific to State Administering Agencies*, Office of Justice Programs, <http://1.usa.gov/1O5K0Iu> (last visited Dec. 14, 2015).

part of its MOA, the FDLE agreed to conduct site visits to monitor the civil rights compliance of its JAG Program subrecipients.⁵ Going forward, the FDLE should revise any site visit compliance checklist it utilizes to include the following question:

Does the subrecipient utilize the Florida Department of Law Enforcement's Law Enforcement Basic Abilities Test to help rank order candidates for any law enforcement officer position?

Answer: Yes/No

If Yes, explain how the LE BAT score is used in the selection process:

The FDLE should provide a copy of the revised site visit compliance checklist to the OCR and provide to the OCR copies of completed checklists for the next twelve months.

If, in conducting site visits, the FDLE learns that a subrecipient misuses the LE BAT by rank ordering candidates, the FDLE should provide a copy of its letter to the subrecipient on this topic and ask the subrecipient to confirm in writing that it will change this problematic practice. If the subrecipient does not provide such written confirmation, the FDLE should notify it that the FDLE will share this information with the OCR and that the OCR may conduct a compliance review of this selection practice or take other appropriate action under the Safe Streets Act or its regulations.

Immediately upon receipt of this letter, please have a representative from the FDLE contact Attorney Advisor Christopher Zubowicz at 202.305.9012 or christopher.zubowicz@usdoj.gov to discuss the FDLE's response to this letter and its recommendations and requests for information. In reviewing the OCR's recommendations and requests regarding subrecipient monitoring, please confer with Petrina Herring, Bureau Chief, Office of Criminal Justice Grants.

Sincerely,

X 

Michael L. Alston
Director
Signed by: MICHAEL ALSTON

cc: Roy Gunnarsson, Training & Research Manager
Criminal Justice Professionalism Division
Florida Department of Law Enforcement
VIA E-MAIL

⁵ Fla. Dep't of Law Enforcement, Methods of Administration 3 (Sept. 18, 2012).

Richard L. Swearingen, Commissioner
Florida Department of Law Enforcement
December 28, 2015
Page 6 of 6

Petrina Herring, Bureau Chief
Office of Criminal Justice Grants
VIA E-MAIL

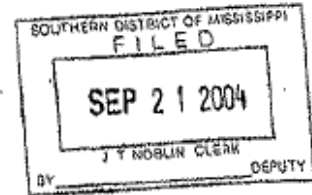
Joe White, Deputy General Counsel
Florida Department of Law Enforcement
VIA E-MAIL

APPENDIX D

**Order by Judge Walter J. Gex, III,
United States District Court for The
Southern Division, September 21,
2004**



IN THE UNITED STATES DISTRICT COURT
FOR THE SOUTHERN DISTRICT OF MISSISSIPPI
SOUTHERN DIVISION



WILLIE MORROW, et al.,

Plaintiff,

-vs-

JIM INGRAM,
Commissioner of Public Safety
of Mississippi, et al.

Defendants.

Civil Action No. 4716 (G)

Judge Walter J. Gex, III

SETTLEMENT AGREEMENT AND ORDER

A: Introduction and History of This Case

1. This action was originally filed on July 30, 1970 as a class action employment discrimination suit pursuant to the Fifth and Fourteenth Amendments to the United States Constitution, Title VI of the Civil Rights Act of 1964; and Title 42, U.S.C. §§§ 1981, 1983 and 2000(d) on behalf of all African-American individuals ("Plaintiffs") seeking declaratory and injunctive relief with respect to discriminatory hiring practices followed in the recruitment, examining and hiring of individuals for the position of State Trooper/Patrolman (hereinafter "Patrol") for the Department of Public Safety of Mississippi (the "Department" or "Defendants").

2. On September 29, 1971 this Court, Judge Nixon presiding, entered an Order finding the hiring practices of the Defendant to be discriminatory, and granting the plaintiffs certain relief. That Order has been modified and supplemented from time to time since 1971. The Court has maintained continuing jurisdiction over this proceeding and over the defendants for purposes of enforcing its orders. The defendants and their



circumstances. Plaintiffs opposed the motion and asserted that the integration in the workforce is due to the consent decree and the 50-50 recruitment order and, if dissolved the workforce would re-segregate.

6. The Department contracted with **Morris & Associates**, an industrial psychological firm, to **develop a valid entry level selection process for the job of State Trooper. That system has now been developed and the Department intends to use that process in the selection of future cadet classes.** Defendant believes that **this is a valid selection process that is job related and consistent with business necessity.** A copy of those procedures and reports has been made available to plaintiffs.

7. All parties agree at this point in time that the Department's current force is 34% African American and the relevant labor market in Mississippi according to the 2000 census is 26% African-American.

8. The Plaintiffs have reviewed the untested selection process and do not believe that disparate impact can be assessed until after the selection process has been implemented.

9. All parties agree that it is in their best interest to avoid the uncertainties, delay and expense of protracted litigation.

10. The parties all recognize the significant benefit to implementing the revised Patrol selection process, including the requisite monitoring and refining as appropriate during its initial implementation.

B. Agreed Implementation of Revised Patrol Selection Process

11. The selection process developed by Morris & Associates, referenced above, will be used to select candidates for subsequent cadet classes of the Mississippi Department of Public Safety. That process consists of the following:
12. All individuals seeking to be hired by the Patrol shall submit an application in compliance with Miss. Code §§ 45-3-7, 45-3-9.
13. All applicants meeting the above minimum qualifications will take the Reading Ability Test developed by Morris & Associates, Management Consultants of Jackson, MS which was submitted to Plaintiffs for review and is under seal with the Court as the "Mississippi Highway Patrol Reading Ability Test," as well as retained by the Department. This Reading Ability Test will test the applicant's ability to read at no more than an 1st grade level as per Flesch-Kincaid.
14. The Reading Ability Test will be graded as "pass" or "fail" with a cut score of 77% or 33 correct answers out of 43 items.
15. All applicants with a "pass" grade will move to the next step in the Patrol selection process.
16. The step following the Reading Ability Test in the Patrol selection process is the Written Examination developed by Morris & Associates, Management Consultants of Jackson, MS which was submitted to Plaintiffs for review and is under seal with the Court as "Mississippi Highway Patrol Written Examination," as well as retained by the Department.



17. All candidates given the Written Examination will also undergo an Oral Interview in compliance with the Oral Interview process outlined in the Entry-level Trooper Oral Board Validation Report prepared by Morris & Associates, Management Consultants of Jackson, MS which was submitted to Plaintiffs for review and is under seal with the Court as "Mississippi Highway Patrol Oral Board Validation Report," as well as retained by the Department.
18. The Written Examination score and the Oral Interview score will be combined and weighted 50/50 to produce a combined score.
19. The applicants will then be placed in rank order based upon the combined scores of the Written Examination and the Oral Interview. The Department will, based upon the rank order, select a number of applicants to advance to the next step of the Patrol selection process, the Background Investigation. The parties agree that the Department will initially implement a top-down ranking order of applicants. If this ranking results in a disparate impact based upon race, the Department will utilize banding of the candidates in an effort to minimize disparate impact.
20. Only those applicants who successfully pass the Background Investigation will move on to the next step in the Patrol selection process, the Polygraph Examination.
21. Those applicants successfully completing the Polygraph Examination will proceed to the next step in the Patrol selection process, the Physical Examination.
22. The applicants successfully completing the Physical Examination will be offered seats as candidates in the Department's academy class.



APPENDIX E

Morris & McDaniel Professional Staff Resumes



DAVID M. MORRIS, PH.D., J.D., FACFE, DABFE

President

DAVID M. MORRIS, PH.D., J.D., FACFE, DABFE

President

Morris & McDaniel, Inc.

Management Consultants

117 South Saint Asaph Street

Alexandria, VA 22314

Tel: (703) 836-3600

Fax: (703) 836-4280

E-Mail: contact@morrisandmcdaniel.com

Employment Experience:

1976 to present	Founded Morris & McDaniel, Inc. and served as Vice President until 1988; 1988 to present, served as President.
1978	Adjunct Faculty, University of Southern Mississippi
1976	Associate for Bayley Associates, Jackson, Mississippi, Industrial/Organizational Management Firm.
1973	Adjunct Faculty, Delgado College, New Orleans, Louisiana
1970 to 1972	Adjunct Faculty, Troy State University, Alabama
1970 to 1972	Research for the U.S. Army
1967 to 1969	Teaching Assistantship, Mississippi State University, Psychology Department

Consulting Experience:

Developed and conducted job-related entry-level police officer screening and vetting procedures for the South Sudan National Police Service (SSNPS), South Sudan.

Developed and conducted promotional examinations and assessment centers for the ranks of Police Captain, Police Lieutenant, and Police Sergeant for the City of Houston Police Department, Houston, Texas.

Developed and conducted entry-level and promotional examinations and assessment centers for the ranks of Fire Captain, Battalion Fire Chief, Deputy Fire Chief and Entry-Level Firefighters for the Kansas City Fire Department, Kansas City, Missouri.



Developed and conducted promotional examinations and assessment centers for the ranks of Law Enforcement and Corrections Lieutenant and Sergeant for the Jefferson County Parish Sheriff's Office, Harvey, Louisiana.

Developed and conducted promotional examinations and assessment centers for the ranks of Fire Marshal, Battalion Chief, Captain, Fire Lieutenant and Engineer (Driver) for the Orange County Fire Rescue Department, Orlando, Florida.

Developed and conducted promotional examinations and assessment centers for the ranks of Police Commander, Police Lieutenant and Police Sergeant for the City of Austin Police Department, Austin, Texas.

Development, implementation and translation of a screening test for potential candidates for the Iraqi Police Service (IPS), Baghdad, Iraq.

Developed and conducted promotional examinations and assessment centers for the ranks of Fire District Chief, Fire Lieutenant, and Entry-Level Firefighter for the Brevard County Fire Rescue, Rockledge, Florida.

Developed and conducted promotional examinations and assessment centers for the ranks of Fire Captain, Lieutenant, Sergeant and EMS Battalion Supervisor/Captain for the District of Columbia Fire and EMS Department, Washington, D.C.

Developed and conducted promotional examinations and assessment centers for the ranks of Law Enforcement and Corrections Lieutenant and Sergeant and Entry-Level for the Palm Beach County Sheriff's Office, W. Palm Beach, Florida.

Developed and conducted promotional examinations and assessment centers for the ranks of Police Lieutenant, Police Sergeant and Master Police Officer (MPO) for the Newport News Police Department, Newport News, Virginia.

Developed and conducted promotional examinations and assessment centers for the ranks of Police Captain, Lieutenant and Sergeant for the City of Richmond Police Department, Richmond, Virginia.

Developed and conducted promotional examinations and assessment centers for the ranks of Battalion Chief, Fire Captain, Fire Lieutenant and Entry-Level Firefighter for the New Haven Fire Department, New Haven, Connecticut.

Developed and conducted promotional examinations and assessment centers for the ranks of Police Captain, Lieutenant and Sergeant for the Chesapeake Police Department and for the ranks of Battalion Chief, Captain and Lieutenant for the Chesapeake Fire Department, Chesapeake, Virginia.



Developed and conducted promotional examinations and assessment centers for the ranks of Assistant Chief, Deputy Chief and Driver for the Hartford Fire Department, Hartford, Connecticut.

Developed and conducted promotional examinations and assessment centers for the ranks of Police Corporal, Sergeant, Lieutenant, and Captain for Norfolk Police Department and the ranks of Fire Captain and Battalion Fire Chief for Norfolk Fire Department for the City of Norfolk, Virginia.

Developed and conducted promotional examinations and assessment centers for the ranks of Fire Driver, Fire Lieutenant, Battalion Fire Chief, Air Crash Chief and Division Chief for Memphis Fire Suppression for the City of Memphis, Tennessee.

Developed and conducted entry-level and promotional examinations and assessment centers for the ranks of Commander, Lieutenant and Sergeant for the Colorado Springs Police Department, Colorado Springs, Colorado.

Developed and conducted promotional examinations and assessment centers for the ranks of Law Enforcement Sergeant, Lieutenant, and Captain for the University of Texas at Houston Police Department (MD Anderson Cancer Hospital), Houston, Texas.

Developed and conducted promotional examinations and assessment centers for the ranks of Lieutenant and Sergeant for the Tucson Police Department, Tucson, Arizona.

Development of entry-level law enforcement and correctional examination for jurisdictions throughout the State of Florida.

Developed entry-level entrance examination process for Entry-Level Police Officer for the City of Philadelphia Police Department, Philadelphia, Pennsylvania.

Developed and conducted entry-level and promotional testing for police jurisdictions throughout the State of Georgia.

Developed and conducted promotional examination and assessment centers for Sergeant and Lieutenant for City of Boston, Massachusetts.

Developed written tests and promotional process for Detective for Boston Police Department, Boston, Massachusetts.

Developed and conducted pre-test training, written tests, and assessment centers for Police Corporal, Sergeant, Lieutenant, Fire Lieutenant, Station Commander, and Shift Commander for Arlington County, Virginia.



Developed job-related Entry-Level Police and Fire examinations for Kenner Police and Fire Departments, Kenner, Louisiana.

Developed and conducted promotional tests for Fire Ranks of Lieutenant, Captain, Battalion Chief, and Assistant Chief for Cleveland Fire Department, Cleveland, Ohio.

Consultant to Port of New Orleans for test development/selection and validation.

Consultant to Amtrak for promotional tests, assessment centers, and performance appraisal systems.

Consultant to Jefferson Parish, Louisiana, for developing a valid and defensible performance appraisal system.

Consultant to Mitchell Engineering for review of selection procedures and applicant flow in anticipation for legal defense work.

Consultant to Southern Scrap for conducting legally defensible personnel selection.

Consultant to the U.S. National Park Service on selection and organizational issues.

Consultant to the State of Wyoming for developing the State's Performance Appraisal System.

Consultant to Johnston-Tombigbee Furniture Co. for review of selection procedures, various personnel aspects, and adverse impact analysis in anticipation of legal defense.

Conducted annual Mississippi Banking Association survey (1986, 1987, 1988) of bank salaries and fringe benefits.

Consultant to State Air and Water Pollution Control Commission (job analysis and job evaluation).

Consultant to Mississippi Department of Public Welfare for the development of a legally defensible training program with valid achievement tests.

Consultant to Seminole Manufacturing for review of recruiting procedures, selection procedures, promotional procedures, and adverse impact analysis in anticipation of legal defense.

Developed promotional examinations for the U.S. Capitol Police.



Conducted comprehensive multi-purpose job analysis for two federal government job series for subcontractor to Human Technology, Inc., for the Office of Personnel Management and Bureau of Labor Statistics.

Conducted job evaluation of 40 jobs and organizational restructuring for Mississippi State Tax Commission.

Conducted job evaluation of selected jobs in the Motor Vehicle Comptroller's Office for Mississippi State Personnel Board.

Conducted three job evaluation projects for: Engineers and Technical Jobs in the State Highway Department, Environmental Engineers in the Pollution Control Bureau, and Industrial Representatives in the Department of Economic Development for Mississippi State Highway Department and Mississippi State Personnel Board.

Conducted comprehensive job analysis and developed selection procedure development for 340 State Jobs for Mississippi State Personnel Board.

Conducted selection and placement of Power Company Managers and Supervisors for Louisiana Power & Light Company, and Mississippi Power & Light Company.

Conducted screening of security personnel for nuclear power industry for Capital Security Services.

Served as the testing expert of record for two power companies as prime contractors for the Nuclear Regulatory Commission.

Developed selection procedure using a written knowledge test and an assessment center for a management position for Mississippi Employment Security Commission.

Developed selection and promotion examinations for three grain operator jobs for Continental Grain Co., New Orleans, Louisiana.

Developed entry-level selection procedure for Medicaid Specialist for Mississippi Medicaid Commission, Jackson, Mississippi.

Conducted cross-national selection testing research project of business companies concerning the use of formal selection tests in the recruitment and selection process for higher status jobs in England, France, and Holland. European Common Market Congress, Europe.



Conducted pre-test training, written examinations and oral boards for Police Sergeants and Lieutenants for Metropolitan Area Transit Authority, Washington, D.C.

Developed and implemented assessment centers for Sergeants, Lieutenants, and Captain and Fire Lieutenants, and District Chief for Police and Fire Department, Corpus Christi, Texas.

Developed and implemented police tests and assessment centers for Corporal, Sergeant, First Sergeant, First Lieutenant, Second Lieutenant, and Captains, for Maryland State Police, Pikesville, Maryland.

Developed and implemented police written tests and assessment centers for Sergeants, Lieutenants, and Captains for Consolidated Office of the Sheriff of the City of Jacksonville, Florida.

Developed job-related Entry-Level Police examinations for Harbor Police of the Port of New Orleans, Louisiana.

Developed job-related Entry-Level Police examination for Orleans Levee Board, New Orleans, Louisiana.

Developed assessment center for Police Sergeant for Rockville City Police Department, Rockville, Maryland.

Developed written examination for Police Detective, Sergeant, Lieutenant and Captains for United States Capitol Police, Washington, D.C.

Conducted individual assessment of Police Candidates for Kenner Police Department, Kenner, Louisiana.

Conducted individual assessment of Police Candidates for St. John the Baptist Parish Police Department.

Conducted individual assessment of Police Candidates for Orleans Levee Board Police Department.

Conducted individual assessment of Police Candidates for Harahan Police Department, Louisiana.

Conducted individual assessment of Police Candidates for Port of New Orleans Police Department, New Orleans, Louisiana.

Developed Entry-Level Firefighter examinations for international market for International Personnel Management Association, Alexandria, Virginia.



Developed and implemented performance appraisal system for Mississippi State Personnel Board.

Developed performance-based merit pay system for state agencies for Mississippi State Personnel Board.

Developed and conducted "Train the Trainers" Program and self-study text on performance standards for Department of the Army, Forces Command Division.

Conducted management assessment for Chief Executive Officer for several private companies. Electric Company, National Association.

Developed and implemented organizational assessment and feedback questionnaire for Bank of Mississippi.

Conducted organizational development for branch office of national accounting firm, Touche Ross.

Conducted organizational development for a food-processing plant for B.C. Rogers Company.

Conducted management training for State Government Managers for Mississippi State Personnel Board.

Developed and conducted job knowledge and skills training program for Welfare Workers for Mississippi State Department of Public Welfare.

Developed pre-employment selection and training program for Welfare Workers for Mississippi State Department of Public Welfare.

Conducted behavioral reliability training for Waterford 3 Nuclear Power Plant, Louisiana Power & Light Company.

Developed and conducted Psychiatric Aide Skills Training Program for Department of Labor, Jobs Training Partnership Act, Nashville, Tennessee.

Developed and conducted customized Food Service Worker Skills Training Program for Department of Labor, Jobs Training Partnership Act, Gulf Coast Business Services Corporation, Gulfport, Mississippi.

Conducted youth entrepreneur summer program for Department of Labor, Jobs Training Partnership Act, Gulf Coast Business Services Corporation, Gulfport, Mississippi.

Evaluation of Pilot Training Programs. Mid Wales Development Board, Great Britain.



Supervised research project regarding equal opportunities in training for Manpower Services Commission, England.

Supervised personal effectiveness and self-development course for Export Credit Guarantee Department, British Civil Service, England.

Developed written tests and assessment centers for Captain for Prince William Fire Department, Prince William, Virginia.

Developed written tests and assessment centers for Fire Lieutenant for Prince William Fire Department, Prince William, Virginia.

Publications:

Morris, D.M., and Thornton, G., The Application of Assessment Center Technology to the Evaluation of Personnel Records, Public Personnel Management, Volume 30 No. 1, Spring 2001.

Morris, D.M., and Pittman, S., Amtrak Police Department, Final Report, Development of the Promotional Procedures for the Position of Lieutenant. Washington, D.C.: Morris & McDaniel, Inc., 1990.

Morris, D.M., and Pittman, S., Amtrak Police Department, Final Report, Development of the Promotional Procedures for the Position of Sergeant. Washington, D.C.: Morris & McDaniel, Inc., 1990.

Morris, D.M., and Pittman, S., Alexandria Fire Department, Final Report, Development of the Promotional Procedures for the Position of Emergency Rescue Technician III. Washington, D.C.: Morris & McDaniel, Inc., 1989.

Morris, D.M., and Pittman, S., Alexandria Fire Department, Final Report, Development of the Promotional Process for the Positions of Lieutenant and Captain. Washington, D.C.: Morris & McDaniel, Inc., 1988.

Morris, D.M., Arlington County Fire Department, Final Report, Development of a Pretraining Package and Examination for Promotion to Fire Supervisor. Washington, D.C.: Morris & McDaniel, Inc., 1984.

Morris, D.M., Arlington County Fire Department, Final Report, Development of a Pretraining Package and Examination for Promotion to Fire Station Commander. Washington, D.C.: Morris & McDaniel, Inc., 1984.



Morris, D.M., Arlington County Fire Department, Final Report, Development of a Pretraining Package and Examination for Promotion to Fire Supervisor. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Morris, D.M., Arlington County Fire Department, Final Report, Development of a Pretraining Package and Examination for Promotion to Fire Shift Commander. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Morris, D.M., Arlington County Fire Department, Final Report, Development of a Pre-Training Package and Examination for Promotion to Fire Station Commander. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Morris, D.M., Arlington County Police Department, Final Report, Development of a Pre-Training Package and Examination for Promotion to Police Sergeant. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Morris, D.M., Arlington County Police Department, Final Report, Development of a Pre-Training Package and Examination for Promotion to Police Lieutenant. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Morris, D.M., Arlington County Police Department, Final Report, Development of a Pre-Training Package and Examination for Promotion to Police Corporal. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Morris, D.M., City of Cleveland Fire Department, Final Report, Development of Promotional Procedures, Washington, D.C.: Morris & McDaniel, Inc., 1989.

Morris, D.M., International Personnel Management Association, Final Report, Development and Validation of IPMA Entry-Level Firefighter Examinations. Washington, D.C.: Morris & McDaniel, Inc., 1989.

Morris, D.M., and Pittman, S., Maryland State Police, Final Report, Development of the Promotional Procedures for Five Ranks. Washington, D.C.: Morris & McDaniel, Inc., 1989.

Morris, D.M., and Pittman, S., Prince William County Department of Fire and Rescue, Final Report, Development of the Promotional Process for Fire Captain. Washington, D.C.: Morris & McDaniel, Inc.

Morris, D.M., and Pittman, S., Prince William County Department of Fire and Rescue, Job Analysis Report for Lieutenant. Washington, D.C.: Morris & McDaniel, Inc., 1989.

Morris, D.M., and Pittman, S., Rockville City Police Department, Final Report, Development of the Promotional Process for the Position of Police Sergeant. Washington, D.C.: Morris & McDaniel, Inc., 1987.



Morris, D.M., and Pittman, S., Rockville City Police Department, Final Report, Development of the Promotional Process for Police Sergeant. Washington, D.C.: Morris & McDaniel, Inc., 1989.

Morris, D.M., and Pittman, S., United States Capitol Police, Content Validity Report for the Position of Sergeant. Washington, D.C.: Morris & McDaniel, Inc., 1988.

Morris, D.M., and Pittman, S., United States Capitol Police, Content Validity Report for the Position of Lieutenant. Washington, D.C.: Morris & McDaniel, Inc., 1988.

Morris, D.M., and Pittman, S., United States Capitol Police, Content Validity Report for the Position of Detective. Washington, D.C.: Morris & McDaniel, Inc., 1988.

Morris, D.M., and Pittman, S., United States Capitol Police, Content Validity Report for the Position of Captain. Washington, D.C.: Morris & McDaniel, Inc., 1988.

Morris, D.M., Jackson Fire Department, Final Report, Development of a Content Valid Promotional Exam for Fire Lieutenant. Washington, D.C.: Morris & McDaniel, Inc., 1990.

Morris, D.M., Boston Police Department, Final Report, Development and Validation of the Promotional Process for Police Sergeant and Lieutenant. Washington, D.C.: Morris & McDaniel, Inc., 1987.

Morris, D.M., Boston Police Department, Final Report, Development and Validation of the Promotional Process for Police Detective. Washington, D.C.: Morris & McDaniel, Inc., 1990.

Morris, D.M., Washington Area Metro Authority Transportation Authority, Job Analysis Report for Police Lieutenant. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Morris, D.M., Washington Area Metro Authority Transportation Authority, Job Analysis Report for Police Sergeant. Washington, D.C.: Morris & McDaniel, Inc., 1985.

Books:

EEO Law and Personnel Practices, Arthur Gutman; David M. Morris, Author of Forward; Tara S. Mead, Sage Production Editor, 1993

Tests Published:

The Multiple-Choice Management In-Basket Exercise. Morris & McDaniel, Inc.: Washington, D.C., 1990.



National Police Entry-Level Examination. Morris & McDaniel, Inc.: Washington, D.C., 1990.

National Firefighter Examination. Morris & McDaniel, Inc.: Washington, D.C., 1989.

IPMA Entry-Level Firefighter Test. International Personnel Management Association: Alexandria, Virginia, 1987.

Presentations Made:

How Data can Improve Selection, Due Diligence, and Promotions - The Newest Personnel Science Rebuilding the Future Police. Invited Speaker by the Pearls of Policing Conference 2014, co-hosted by the Federal Bureau of Investigation, San Francisco, California, 2014.

Strengthening your Selection and Promotion will Strengthen your Police. Invited Speaker by the Nepal Police Command Staff, Kathmandu, Nepal, 2014.

For a More Stable and Secure Country, Improved Police Screening is a Must. Invited Speaker by the 17th Asia-Pacific Chapter FBINAA Retraining Conference, Kathmandu, Nepal, 2014.

Using New Screening & Promotional Procedures to Strengthen a Country's Internal Security. Invited to speak at the meeting of the Executive Committee of the Indonesian Police, Jakarta, Indonesia, 2013.

Using New Screening & Promotional Procedures to Strengthen a Country's Internal Security. Invited Speaker by the Inspector General of the Uganda Police Force, the Republic of Uganda, 2013.

Meeting the Challenge of Legally Defensible Selections and Promotions Which Yield Diversity. Invited Speaker by The Commission on Accreditation for Law Enforcement Agencies, Inc. (CALEA), Winston-Salem, North Carolina, 2013.

Recruitment and Due Diligence: Reshaping Police Human Resources. Invited Speaker by the International Criminal Police Organization's (Interpol) 82nd General Assembly, Cartagena de Indias, Colombia, 2013.

Meeting the Challenge of Legally Defensible Selections and Promotions Which Yield Diversity. Invited Speaker by the FBI NAA Annual Training Conference, Orlando, Florida, 2013.



Lessons Learned in War: Using New Screening & Promotional Procedures to Strengthen a Country's Internal Security Against Counter Terrorism. Invited Speaker by the 16th Asia Pacific Chapter FBI NAA, Bangkok, Thailand, 2013.

Solving the Diversity Problem in Promotional and Entry-Level Selections and Involving Stakeholders. Invited Speaker by the Fire Rescue International (FRI), Chicago, Illinois, 2010.

How to Conduct Promotional and Entry-Level Selections while Involving Stakeholders. Invited Speaker by the Fire Metro Chiefs 2010 Expo, Memphis, Tennessee, 2010.

Important Considerations for Conducting In-House Assessments for Selections and Promotions. Invited Speaker by the Massachusetts Municipal Personnel Association representing the International Public Management Association for Human Resources (IPMA-HR), Boxborough, Massachusetts, 2009.

Using Modern Assessment Techniques to Rebuild the Security Forces in War-Torn Iraq. Invited Speaker by the American Psychological Association, San Francisco, California, 2007.

Using Cross-Cultural Tests to Help Rebuild Iraqi Security Forces - Implications for Global HR Manager. Invited Speaker by the International Public Management Association for Human Resources, St. Louis, Missouri, 2007.

Using Cross-Cultural Tests to Help Rebuild Iraqi Security Forces - Implications for Global HR Manager. Invited Speaker by the Association of Test Publishers, Palm Springs, California, 2007.

Using Modern Assessment Techniques to Rebuild the Security Forces in War-Torn Iraq - Implications for Global HR Manager. Invited Speaker by the 33rd International Congress on Assessment Center Methods, London, England, 2006.

Selecting the Best: The Latest in State-Of-The Art Personnel Selection. Invited Speaker/Workshop by SHRM, Jackson, MS 2006.

Establishing the New Entry-level Police Screening Test for the Nation of Iraq. Invited Speaker by the Personnel Testing Council/Metro Washington, November PTC/MW Luncheon, Washington, D.C., 2004.

The Reconstruction of Iraq. Invited Speaker by the American National Standards Institute, ANSI Personnel Certification Summit, Washington, D.C., 2004.

Applicant and Employee Testing and Evaluation in Today's Legal Environment. Invited Speaker by the SMU Dedman School of Law, Labor and Employment Law Seminar, Hot Springs, Virginia, 2003.



Legal Issues in Assessment Centers and Other Performance-Based Assessments. Invited Speaker by the Grand Lodge Fraternal Order of Police, Phoenix, Arizona, 2001.

Occupational Assessment of Personality in Non-Pathological Populations and Assessment Issues, Techniques and Challenges in Occupational Evaluations. Invited Speaker by the Department of Psychology, Massachusetts Mental Health Center of Harvard Medical School, 2001.

Legal Implications of Some Selective Industrial/Organizational Psychology Practices. Invited Speaker at the Georgia Association of Psychology, Atlanta, Georgia, 2000.

Multiple-Choice In-Baskets for Management Assessment. Invited speaker at the International Congress on Assessment Centers, Orlando, Florida, 1999.

Effective Applicant and Employee Evaluation and Testing. Jackson, Mississippi, 1998.

Series of Personnel Seminars, 1986. Morris & McDaniel, Ltd., in conjunction with Morris & McDaniel, Inc., conducted a series of seminars on the following issues: "The Uses and Abuses of Selection Tests"; "Recent Developments in Assessment Centers"; and "Issues of Validity in Selection Testing." London, England.

Multiple-Choice In-Baskets for Management Assessment. Invited speaker at the International Congress on Assessment Centers, Toronto, Canada, 1991.

Legal Issues in the Selection Process. The International Association of Chiefs of Police, September, 1990.

The New Legal Issues: Employment Testing and Assessment. American Management Association in San Francisco, California, April 1990.

Testing Economy and Usefulness. General Electric In-House Conference for Human Resource Managers, Charlotte, North Carolina, 1990.

Legal Issues in Testing and Assessment. The InSci User's Conference, Atlanta, Georgia, October, 1990.

Using Assessment Centers as a Management Skills Audit. Invited speaker at the October International Training and Development Conference of the Management Centre Europe, in Brussels, Belgium, October, 1987.



Building Legal Defensibility into Selection Programs. American Psychological Association, Division for Industrial/Organizational Psychology, Continuing Education Program, August, 1986.

EEO Guidelines and Psychological Testing. Louisiana Psychological Association Meeting.

The Role of a Consultant. Southeastern Conference for State Personnel Directors.

Getting the EEO Lightning Rods Out of Your Personnel Practices. Mississippi Association of City Clerks, Tax Assessors, and Collectors.

Tests Can Save You Millions of Dollars in Production. American Society of Public Administrators.

The Gathering of Storm Clouds in the Weber Decision. International Association of Personnel in Employment Security.

Personnel Law After Bakke. American Society of Public Administrators, annual meeting, 1978.

Psychologists in the Courtroom. The Louisiana Psychological Association convention, one-day workshop.

An analysis of the U.S. Supreme Court Decision on Bakke. International Association of Personnel in Employment Security, annual meeting, 1978.

Legal Experience: Case Preparation, Testimony

Technical assistance to Emory A. Plitt, Maryland Attorney General's Office, for negotiations involving the Black Trooper's Association.

Consultant to Threadgill and Smith, Attorneys at Law, for reviewing adverse impact analysis, promotional procedures, and selection procedures in anticipation of litigation.

Consultant to Sidney A. Bache, Attorney at Law, giving expert witness testimony in Federal Court regarding promotional and testing procedures.

Consultant to Rhonda Lustman, Attorney at Law, for reviewing consent decree and giving expert testimony in Federal Court regarding promotional and testing procedures and their effect on women.



Consultant to Dale Wilkes, Attorney at Law, for reviewing consent decree and giving expert testimony in Federal Court regarding promotional and testing procedures and their effect on Hispanics.

Consultant to Mississippi Attorney General's office for Title VII Lawsuit defense, assistance with data analysis, applicant flow analysis, test validation and expert witness testimony.

Technical assistance to Mitchell Engineering for review of selection procedures and applicant flow in anticipation of legal defense work.

Technical assistance to Seminole Manufacturing Company for review of recruiting procedures, selection procedures, promotional procedures, and adverse impact analysis in anticipation of legal defense.

Technical assistance to Threadgill and Smith, Attorneys at Law, for reviewing adverse impact analysis, promotional procedures, and selection procedures in anticipation of litigation.

Technical assistance to Sidney A. Bache, Attorney at Law, giving expert witness testimony in Federal Court regarding promotional and testing procedures.

Technical assistance to Rhonda Lustman, Attorney at Law, for reviewing consent decree and giving expert testimony in Federal Court regarding promotional and testing procedures and their effect on Hispanics.

Technical assistance to Johnston-Tombigbee Furniture Company for review of selection procedures, and various personnel practices, and adverse impact analysis in anticipation of legal defense.

Technical assistance to Attorneys for Arlington County, Virginia, in the defense of selection procedures.

Technical assistance to Attorneys for the Mississippi State Personnel Board for the defense of minimum qualifications.

Technical assistance to Attorneys for the City of Jacksonville, Florida, for defense of selection procedures.

Technical assistance to Attorneys and Management for the U.S. Park Service regarding the development of legally defensible selection systems.

Technical assistance to Attorneys for the City of Cleveland, Ohio, for presentation of validity evidence on personnel selection.



Technical assistance to Attorneys for the City of Rockville, Maryland, for defense of selection procedures.

The following are case citations and attorneys for use in the evaluation of legal support services provided by David Morris:

William Howe, et al. v. City of Akron, United States District Court for the Northern District of Ohio, Eastern Division, Case No. 5:06-CV-2779

Attorney: Aretta K. Bernard, Roetzel & Andress
(330) 849.6630
Patricia Ambrose, Assistant Director of Law and Interim
Personnel Director, City of Akron, Ohio
(330) 375-2030

Dwight Bazile, et. al. v. City of Houston, Texas, United States District Court Southern District of Texas, Houston Division, Case No. 4:08-cv-02404

Attorney: Lowell F. Denton, Denton Navarro Rocha & Bernal, P.C.
(210) 227-3243

United States v. City of Garland, Texas, United States District Court for the Northern District of Texas, Dallas, Division, Case No. 3:98CV-0307-L.

Attorney: Lisa Von Eschen, Latham & Watkins
(213) 891-7502

Barbara Arrington, et. al., v. Southern Pine Electric Power Association, Circuit Court of Smith County, Mississippi, Case No. 99-0002.

Attorney: Monte Barton, Copeland, Cook, Taylor & Bush
(601) 856-7200

Willie Morrow, et al. vs. Jim Ingram, Commissioner of Public Safety of Mississippi, et al., Civil Action Number 4716 (G)

Attorney: James W. Younger, Jr., Mississippi Department of Public
Safety
(601) 987-1212

U.S.A. v. Jefferson County, Civil Action No.: CV-75-S-0666-S

Attorney: Anne R. Yuengert, Bradley, Arant, Rose & White LLP
(205) 521-8000

Deambra Brown, et. al. v. Kellogg Company, Kellogg USA, Inc., Case No. 8:98CV-383

Attorney: Bill Muth, Berens & Tate, P.C.
Christopher E. Hoyme, Berens & Tate
(402) 391-1991

Mulderig v. City of Philadelphia, CP, Civil Trial Division, No. 546.



Attorney: John C. Straub, former Chief Deputy City Solicitor
(215) 684-6176

Sara Beard v. The Mississippi State Department of Education, et. al., Civil Action No: 3: 94CV542BN

Attorney: Armin J. Moeller, Jr.
(601) 965-8156

United States of America et al., v. City of Montgomery, et al., Civil Action No. 3839-N:

Attorney: Thomas M. Goggans, Montgomery, Alabama
(334) 834-2511

Denise Chapman, Kenneth Donnell, Joseph Langston, Frederick Moore, Larry Robinson v. Brinker International Inc. d/b/a Chilli's Grill and Bar, and Grady's Inc., d/b/a Grady's American Grill, U.S. District Court, Southern District of Mississippi, Jackson Division, Case No. 3:95CV628LN.

Attorney: James D. Bell, Bell & Associates
(601) 898-1111

Cecil Hankins v. City of Philadelphia, U.S. District Court for the Eastern District of Pennsylvania.

Attorney: Howard Lebofsky, Deputy City Solicitor
(215) 685-5123

William P. Hammons, et al., v. Oscar Adams, et al.

Attorney: Louis L. Robein, Jr., Gardner, Robein, & Healey, New Orleans, Louisiana
(504) 885-9994 Analyzed applicant flow.

Massachusetts Association of Minority Law Enforcement Officers (MAMLEO) v. Boston Police Department, U.S. District Court; Docket No. 78-529-S. Court Presentation before Judge Walter Jay Skinner regarding Test Issues.

Attorney: John Albano,
(617) 951-8360

Larry Williams, et al. v. City of New Orleans, et al. Eastern District of Louisiana, No. 73-629, Section "G." Served as expert for four different interveners who were objecting to the Consent Decree for the New Orleans Police Department.

Attorneys: Sidney Bache, Rhonda Lustman, Lynn Wasserman, and Dale Wilkes
(504) 888-3700

Clinton W. Hammock, et al. v. City of Auburn, et al., U.S. District Court for the Middle District of Alabama, Eastern Division, Civil Action 87-V-680-E.

Attorney: Dudley Perry, Perry & Russell, Montgomery, Alabama



(334) 262-7763

Carolyn Jordan, et al. v. John Wilson, et al. U.S. District Court, Middle District of Alabama, Civil Action No. 75-19-N.

Attorney: Thomas M. Goggans, Montgomery, Alabama
(334) 834-2511

Thomas J. Wise v. Arlington County, Virginia, U.S. District Court, Civil Action 85-256-A.

Alice Anselmo v. Mayor and City Council of Rockville, Maryland, et al., U.S. District Court, Maryland District, Civil Action No. JFM-87-2311.

Attorney: Judith Catterton, City Attorney's Office
(301) 294-0460

Paul Carr et al. v. Massachusetts Department of Personnel Administration, Case Nos. G-461, 462, 463, 464, and 465. Before the Commonwealth of Massachusetts Civil Service Commission.

Attorney: Harold L. Lichten, Angoff, Goldman, Manning, Pyle, Wangner & Hiatt
(617) 723-5500

Administrative Hearing before the Akron Civil Service Commission, Re: Appeal for Tom Kelly and Jack Porter.

Attorney: Patricia Ambrose Rubright, Assistant Director of Law,
Department of Law, City of Akron, Ohio
(216) 375-2030

Captain Alex Torres, et al v. City of San Antonio Police Department, et al, U.S. District Court Western District of Texas, San Antonio Division, No. SA-94-CA-242.

Attorney: Reuben Campos, Figueroa, Barrera & Harvey, P.C.
(210) 227-3700

Emma Ruth Davis, Ollie Mae Hood, and Martha Ann Hood v. Lamar Manufacturing Company, Inc., District Court for the Northern District, Alabama, No. CV-80-HM-1215-J.

Attorney: Taylor Smith, Threadgill & Smith, Columbus, Mississippi
(662) 244-8824

Norma J. Mustin, for Herself and All Others Similarly Situated v. Four County Electric Power Association. Northern District of Mississippi, Eastern Division No. EC 81-280-W-P.

Attorney: Taylor Smith, Threadgill & Smith, Columbus, Mississippi
(662) 244-8824



Mississippi Council on Human Relations, Barbara Phillips, Cornell Green Rice, Patricia A. Catchings and Jim Davis Hull v. State of Mississippi Department of Justice of the State of Mississippi, A. F. Summer, Individually and in His Official Capacity as Attorney General of the State of Mississippi, U.S. District Court, Southern District, No. J-76-118-R.

Attorney: Mary Lawrence Gervin, Jackson, Mississippi
(601) 946-5566

Robert Parks, et al. v. Johnston-Tombigbee Furniture Manufacturing Company, U.S. District Court, Northern District, Mississippi, No. EC 78-174-S-O. Data Analysis and Applicant Flow Analysis.

Attorney: Taylor Smith, Threadgill & Smith, Columbus, Mississippi
(662) 244-8824

Grace Ann Ervin and Olive Stewart v. Johnston-Tombigbee Furniture Manufacturing Company, U.S. District Court, Northern District, Mississippi, No. EC 78-216-S-O. Data Analysis and Applicant Flow Analysis.

Attorney: Taylor Smith, Threadgill & Smith, Columbus, Mississippi
(662) 244-8824

Joe Durrah v. CECO Corporation D/B/A Mitchell Engineering Company, U.S. District Court, Northern District, Mississippi, No. EC 78-206-S-O. Data Analysis and Applicant Flow Analysis.

Attorney: Taylor Smith, Threadgill & Smith, Columbus, Mississippi
(662) 244-8824

United States v. City of Jackson, Mississippi, No. J74-66(N).

Attorney: Tim Hancock, City Attorney's Office
(601) 960-1799

Wade v. Mississippi Cooperative Extension Service, et al. (Analyzed Data Relevant to Consent Decree for Defendant's Attorney). Northern District, Mississippi.

Attorney: Mary Lawrence Gervin, Jackson, Mississippi
(601) 946-5566

United States v. Mississippi State Department of Public Welfare, et al. Dorothy Wallis v. Mississippi State Department of Public Welfare, Northern District, Mississippi, No. GC 73-5-S.

Attorney: Mary Lawrence Gervin, Jackson, Mississippi
(601) 946-5566

Morrow v. Dillard, 580 FED 2nd 1284. (Conducted Post-Trial Validation Studies).

Attorney: Mary Lawrence Gervin, Jackson, Mississippi
(601) 946-5566



Ernestine Forest v. Mississippi Game and Fish Commission. EEOC charge No. TJA 6-0802. Analyzed Applicant Flow and Minimum Qualifications.

Attorney: Mary Lawrence Gervin, Jackson, Mississippi
(601) 946-5566

Wayne F. Latham, v. Mississippi State Tax Commission. Expert Witness in Federal Court, District Court for the Northern District of Mississippi, Greenville District No. GC82-132-WK-O. Provided expert testimony regarding minimum qualifications, i.e., age requirements.

Attorney: Mary Lawrence Gervin, Jackson, Mississippi
(601) 946-5566

Bessie Thompson v. Mississippi State Personnel Board, et al., Northern District, Mississippi No. GC82-203-WK-O. Analysis of Applicant Flow Data in order to provide defense for minimum qualifications.

Attorney: Mary Lawrence Gervin, Jackson, Mississippi
(601) 946-5566



New Orleans Fire Fighters Association Local 632, et al. v. City of New Orleans (1986 lay-offs within the New Orleans Fire Department using performance appraisals).

Attorney: Louis L. Robein, Jr.
(504) 885-9994

Robert G. Fowler v. McCrory Corporation, Southern District, Maryland No. JFM 87-1610. Analysis of selection procedures and performance appraisal system.

Attorney: Jean M. MacHarg, Patton, Boggs, and Blow
(202) 457-5235

Francine Green v. Fairfax County School Board, et al. District Court for the Eastern District of Virginia, Civil Action No. 93-104-A.

Attorney: Charlson & Bredenhof, Fairfax, Virginia
(703) 352-2340

David Anderson v. B.C. Rogers Poultry, Inc., Scott Circuit No. 10,390.

Attorney: Joe L. McCoy, McCoy, Wilkins, Stephens & Tipton, P.A.
(601) 366-4343

George Glover, Jr. and Loretta Glover v. Officer Charles Brenke, individually and in his capacity as an officer of the Lafayette Police Department, City of Lafayette Police Department and City of Lafayette, U.S. District Court, Western District of Louisiana, Lafayette-Opelousa Division. Civil Action CV 93-0510.

Attorney: Stephen Santillo, Glenn Armentor, Ltd.
(318) 233-1471

United Black Firefighters Association, et.al., v. City of Akron, et.al., United States District Court for the Northern District of Ohio, Eastern Division, Case No. 5:90CV-1678.

Attorney: Bonnie I. O'Neil, Thompson, Hine & Flory
(614) 469-3200

Caroline Burney v. Rhee Manufacturing Company, United States District Court for the Middle District of Alabama, Northern Division, Case No. CV97-D-1300-N.

Attorney: Henry C. Barnett, Jr., Capell, Howard, Knube & Cobbs
(334) 241-8059

ADA Assistance, Frank Cantrell, Attorney. (901) 754-8001

ADA Assistance, Mary Lawrence Gervin, Attorney. (601) 946-5566



Education:

- Ph.D. University of Southern Mississippi, 1975
Psychology, specialization in Industrial/Organizational Psychology
- J.D. Mississippi College School of Law, 1981
Attended the Hague Academy for International Law
(Hague, the Netherlands), 1985, 1986, and 1987 sessions
- M.S. Mississippi State University, 1969
Psychology
- B.S. Millsaps College, 1967
Psychology

Scholarships/Honors:

- 2007 IPMA Assessment Council, Certificate of Merit for Work in Iraq
- 1968-1969 Mississippi State University, Research Fellowship
- 1967-1968 Mississippi State University, Teaching Assistantship
- 1964-1966 Millsaps College, Football Scholarship
- 1963 Millsaps College, Scholastic Scholarship

Teaching Experience:

- 2001 Visiting Faculty at Harvard Medical School
Contemporary Applications of Psychological Testing (April)
- 1978 Adjunct Faculty, University of Southern Mississippi
- 1973 Adjunct Faculty, Delgado College, New Orleans, Louisiana
- 1970-1972 Adjunct Faculty, Troy State University, Alabama
- 1969-1970 Teaching Assistantship, Mississippi State University, Psychology Department

Courses Taught (Graduate & Undergraduate):

- Industrial/Organizational Psychology - University Southern Mississippi, 1978
- Educational Psychology - Troy State University
- Physiological Psychology - Troy State University
- Introduction to Psychology - Delgado College, Mississippi State University



Professional Memberships:

American Psychological Association, Division 14
(Industrial/Organizational Psychology)
American Psychological Society
Association of Test Publishers
Diplomat American Board of Forensic Examiners
Mississippi Psychological Association
Southeastern Psychological Association
International Public Management Association (IPMA)
Personnel Testing Council of Metropolitan Washington
Mississippi State Bar Association
Society for Human Resource Managers
Society of Industrial and Organizational Psychology

Licensors:

Massachusetts State Psychology License - License number 7161
Louisiana State Psychology License - License number 387
Mississippi State Psychology License - License number 186-16
Mississippi Bar Association License – License number 3480

Military:

Vietnam Era Veteran, U.S. Army
Research for U.S. Army (1970-1972)



JOSEPH F. NASSAR
Vice-President
Project Coordinator

Education: 1976
Master of Public Administration, University of Mississippi.

1975
Bachelor of Science, Major: Criminal Justice, Delta State
University.

Work Experience: January, 1977 to Present
Vice-President, Senior Staff Consultant, Morris & McDaniel, Inc.,
Management Consultants.

April, 1980 to June, 1983
Instructor in the Business Administration Department, Phillips
College, Jackson, Mississippi.

July, 1976 to September, 1976
Administrative Intern, Governor's Office of Human Resources,
Jackson, Mississippi.

Consulting Experience:

Developed and conducted promotional examinations and assessment centers for the ranks of Law Enforcement and Corrections Lieutenant and Sergeant and Entry-Level Selection for the Palm Beach County Sheriff's Office, West Palm Beach, Florida.

Developed and conducted entry-level and promotional written examinations and assessment centers for the ranks of Fire Captain, Battalion Fire Chief, Deputy Fire Chief and Entry-Level Firefighters for the Kansas City Fire Department, Kansas City, Missouri.

Developed and conducted promotional written examinations and assessment centers for the ranks of Police Corporal, Sergeant, Lieutenant, and Captain for Norfolk Police Department and the ranks of Fire Captain and Battalion Fire Chief for Norfolk Fire Department for the City of Norfolk, Virginia.

Developed and conducted promotional written examinations and assessment centers for the fire suppression ranks of Fire Driver, Fire Lieutenant, Battalion Fire Chief, Air Crash Chief and Division Chief; for rank of Air Rescue Chief and EMS ranks of EMS Division Chief, EMS Battalion Chief, EMS Lieutenant; and



for Fire Prevention ranks of Investigator, Inspector, Inspector Supervisor, Investigative Services Manager, and Fire Marshall, and for Fire Communication ranks of Watch Commander and Senior Fire Operator for Memphis Fire Department for the City of Memphis, Tennessee.

Develop and conducted promotional written examinations and assessment centers for the ranks of Lieutenant and Sergeant for the Tucson Police Department, Tucson, Arizona.

Development of entry-level law enforcement and correctional officer examination for law enforcement jurisdictions throughout the State of Florida.

Developed entry-level entrance examination process for Entry-Level Police Officer for the City of Philadelphia Police Department, Philadelphia, Pennsylvania.

Developed and conducted entry-level and promotional testing for law enforcement jurisdictions throughout the State of Georgia.

Developed and conducted promotional examination and assessment centers for Sergeant and Lieutenant for City of Boston, Massachusetts.

Developed written tests and promotional process for Detective for Boston Police Department, Boston, Massachusetts.

Conducted job analysis, developed and conducted written knowledge tests and promotional assessment centers for Captain, Lieutenant, and Sergeant for Boston Police Department.

Conducted job analysis, developed written knowledge test for Detective for Boston Police Department.

Conducted job analysis, developed and conducted written knowledge tests and promotional assessments for Captain, Lieutenant, and Sergeant for the Boston Police Department.

Conducted job analysis, developed and conducted promotional assessment centers for Captain, Lieutenant, and Sergeant for the Akron Civil Service Commission and Akron Police Department.

Conducted job analysis, developed and conducted promotional assessment centers for Fire Lieutenant, Captain, and Assistant Fire Chief for the Akron Civil Service Commission and Akron Fire Department.

Conducted job analysis, developed and conducted promotional assessment centers for Captain and Lieutenant for the San Antonio Police Department.



Conducted job analysis, developed written knowledge tests for the ranks of Captain, Lieutenant, Sergeant and Detective-Investigator and service based assessment exercises for the ranks of Captain and Lieutenant for the San Antonio Police Department.

Developed and implemented a statewide performance appraisal system for Mississippi State Personnel Board.

Developed performance-based merit pay system for state agencies for Mississippi State Personnel Board.

Developed and conducted promotional tests for Fire Ranks of Lieutenant, Captain, Battalion Chief, and Assistant Chief for Cleveland Fire Department, Cleveland, Ohio.

Developed and conducted assessment procedures for the ranks of Assistant Police Chief and Police Sergeant for the Little Rock Police Department

Conducted job analysis and developed written knowledge tests for the ranks of Police Lieutenant and Sergeant for the Harbor Police Department, Port of New Orleans.

Developed In-Basket exercise for the position of Administrative Assistant for Akron Civil Service Commission.

Developed Entry-Level Firefighter examinations for international market for International Personnel Management Association, Alexandria, Virginia.

Developed Written Tests and assessment centers for Captain and Lieutenant for Prince William Fire Department, Prince William, Virginia.

Developed and implemented assessment centers for the ranks of Sergeant, Lieutenant, and Captain for Consolidated Office of the Sheriff of the City of Jacksonville, Florida.

Developed assessment centers for the ranks of Corporal, Sergeant, First Sergeant, First Lieutenant, Second Lieutenant, and Captain for the Maryland State Police, Pikesville, Maryland.

Developed job-related aptitude Entry-Level Police examinations for Harbor Police for the Port of New Orleans, Louisiana.

Developed job-related aptitude Entry-Level Police examination for Orleans Levee Board, New Orleans, Louisiana.



Developed Entry-Level Written Test and oral examination for police recruits for the City of Laurel, Mississippi.

Developed and implemented performance appraisal system for statewide use for the Mississippi State Personnel Board.

Assisted in the organizational study for the Mississippi Department of Education.

Assisted in the organizational study for the Mississippi Department of Insurance.

Consultant to State Air and Water Pollution Control Commission (job analysis and job evaluations).

Conducted job evaluation of 40 jobs and organizational restructuring for Mississippi State Tax Commission.

Developed and conducted assessment process for the position of Detention Officer Supervisor and 911 Emergency Operations Supervisor for the Roswell, Georgia Police Department

Developed and conducted assessment centers for the ranks of Police Captain, Lieutenant and Sergeant for the Columbus, Georgia Police Department.

Developed and implemented organizational assessment and feedback questionnaire for Bank of Mississippi

Developed an assessment battery for the position of Bank Teller and Customer Service Representative for Deposit Guaranty National Bank.

Assisted the Mississippi Attorney General's Office for Title VII Lawsuit Defense Assistance with Data Analysis, applicant flow analysis, and test validation.

Assisted a National Engineering Firm for review of selection procedures and applicant flow in anticipation for legal defense work.

Consultant to Private Food Industry for personnel and management assessment. Consultant to a Private Food Industry for identification of organization problems, staffing needs in supervisors, and employee turnover.

Scholastic

Honors:

1976 Pi Sigma Alpha (Political Science Honor Society).

1975 Who's Who in American Colleges and Universities.



ROGER MCMILLIN, J.D.
Vice-President of Operations
Project Controller

Education:

New Albany High School
Graduated 1963

Mississippi State University
Graduated 1967, BA with honors

University of Memphis Law School
Graduated 1972, JD

Military:

Attended Naval Officer Candidate School, Newport, RI, 1967
Commissioned as Ensign

Served as Division Officer, Naval Security Group,
Principal duty station, NavRadSta, Sabana Seca Puerto Rico

Completed active duty tour September 1969.

Employment History:

Regional Attorney's Office, U.S. Department of Agriculture 1972 to 1976

Associate in law firm of Scott, Barbour and Scott, Jackson, MS 1976

Private law practice in New Albany, MS 1977 to 1994, principally as Partner in firm of Sumners, Carter & McMillin

Served as City Attorney for City of New Albany 1982 to 1994

Elected to Miss. Court of Appeals November 1994 for term beginning January 1995

Served as Chief Judge of Court of Appeals from 1999 to 2004, retired from Court April 2004

General Counsel and Vice-President for Operations, Morris & McDaniel, Inc. May 1, 2004 to present.



LANA PRUDHOMME WHITLOW
Vice-President/Psychometrician
Senior Staff Consultant

Education:

2002-2004 – Doctorate of Philosophy in Psychology (Ph.D.)
Concentration: General Systems
Southern California University for Professional Studies
Santa Ana, California

1987-1989 – Master of Science (M.S.)
Major: Counseling Psychology
Concentration: Psychological Testing
University of Southern Mississippi
Hattiesburg, Mississippi

1983-1987 - Bachelor of Science (B.S.)
Major : Psychology
Minor: Sociology and Philosophy
Louisiana State University
Baton Rouge, Louisiana

Employment:

May 1990 to present

Morris & McDaniel, Inc.

Coordinates activities of the New Orleans office including all testing of private and public sector organizations. Director of Marketing for testing solutions for law enforcement. Responsibilities in New Orleans include psychological screening of police and fire applicants and data analysis, job analysis, job evaluation and organizational analysis.

October 1989 - Present

John Pleune, Ph.D., Clinical Psychologist

Private Practice - Part-time work with Dr. John Pleune as his testing assistant. Primary responsibilities; working with outpatient population in administering appropriate psychological tests and evaluating each client regarding the referral question. Consultant for NorthShore Psychiatric Hospital; interviewing inpatients and writing psychological evaluations regarding their treatment. These evaluations include a diagnosis of the presenting problem as well as treatment recommendations



September 1989 - February 1990

Ochsner Foundation Hospital

Department of Psychiatry - Psychometrician.

Primary responsibilities involved administration of psychological tests to inpatient and outpatient populations.

July 1989 - October 1989

NorthShore Psychiatric Hospital

Adolescent and Adult Units - Internship

Primary responsibilities involved conducting psychological testing and writing psychological evaluations for patients admitted to the Adolescent and Adult units. Consulted with and was supervised by John Pleune, Ph.D., and Glenda Clark, B.C.S.W. Co-leader for adult intimacy groups, involved in adolescent chemical dependency groups, and attended daily community meetings on these units.

August 1987 - May 1989.

Department of Counseling Psychology,

University of Southern Mississippi.

Primary responsibilities involved working under Dr. Daniel Randolph as his graduate assistant, teaching assistant and research assistant. These duties involved reference searches and library work, teaching assistance for mainly his undergraduate classes, as well as basic office responsibilities. Researching materials regarding Helping Professions and coordinated and presented lecture material for undergraduate classes.

January 1989 - May 1989

Department of Counseling Psychology,

University of Southern Mississippi.

Throughout this practicum responsibilities consisted of referrals from the courts or the office of Public Welfare; sexually abused children, adolescents with behavior or school problems, and adults with family and marital difficulties. Also responsible for intake evaluations and child sexual abuse evaluations in the counseling lab. The theoretical focus of this lab was mainly from an interpersonal perspective.

January 1989 - May 1989

Department of Counseling Psychology,

University of Southern Mississippi.

Responsibilities included co-leading a group of 12 counseling psychology graduate students to help them feel comfortable in disclosing feelings, dealing with problem areas in their personal lives, as well as teaching them how to be a group member.



August 1988 - December 1988

Department of Counseling Psychology,
University of Southern Mississippi.

Practicum responsibilities were to demonstrate competency in individual therapy, assessment and consultation. Clients consisted largely of students from the university population as well as non-students from the community.

Research Experience:

June 2004 – December 2004

Southern California University for Professional Studies

Doctoral dissertation study linking the independent relationship between a measurable work ethic dimension to law enforcement success within a police academy.

May 1988 - August 1988

University of Southern Mississippi.

Designed and implemented a project concerning the impact of an alcohol and drug abuse course, taught by Dr. John Alcorn, on drinking practices and attitudes about alcohol use and abuse among graduate psychology students. The study included a control and experimental group of student volunteers on the university campus. Pre-tests and post-tests, which were devised by the experimenter, were administered throughout the semester. Results have been used by the instructor to support the various intervention strategies.

January 1988 - May 1988

Forrest General Hospital

Testing children using various tests depending on the age of the child. The project was designed to investigate the effects of the birth of a second child into a family.



**JEFFREY S. RAIN, PH.D.
SENIOR STAFF CONSULTANT**

Education:

1991, Ph.D. Baton Rouge	Industrial/Organizational Psychology: Louisiana State University, Minors: Experimental Statistics and Clinical Psychology
1987, M.A. Baton Rouge	Industrial/Organizational Psychology: Louisiana State University,
1985, B.A.	Psychology: The Citadel, Charleston, South Carolina

SELECTED CONSULTING PROJECTS

Selection Criteria Development and Validation Projects:

Implementation of promotional testing process (operations-based performance assessment) for county fire rescue agency (2 ranks). 2010.

Development and Implementation of promotional testing process (written knowledge exam and operations-based performance assessment) for county fire rescue agency (4 ranks). 2008-2009.

Development and Implementation of promotional testing process for city fire department (rank of Fire Engineer). 2008.

Test equating and content validation study of three alternate versions of an entry-level law enforcement exam and an entry-level corrections officer exam conducted for contractor to State Department of Law Enforcement testing program, 2007 to 2010.

Content validation study of physical ability exam for entry-level firefighter for city fire department. 2006-2007.

Criterion validation study of multiple-choice in-basket management exercise conducted for personnel testing firm. 2005 to present.

Employment evaluations for sworn and non-sworn positions for law enforcement agency. 1993 to 2008.

Test equating and criterion validation of three alternate versions of an entry-level law enforcement exam and an entry-level corrections officer exam conducted for contractor to State Department of Law Enforcement testing program, 2004.



Criterion validation study of Iraqi entry-level police officer exam conducted for contractor to Civilian Police Assistance Training Team (CPATT), Office of Security Transition, 2003-2006.

Development and implementation of written knowledge exam and assessment center for Law Enforcement Officer-Sergeant promotion for law enforcement agency. 2004.

Development and implementation of written knowledge exam and assessment center for Law Enforcement Officer-Lieutenant promotion for law enforcement agency. 2003.

Development and implementation of written knowledge exam and assessment center for Corrections Sergeant & Corrections Lieutenant promotion for law enforcement agency. 2002 to 2003.

Development and implementation of written knowledge exam and assessment center for Law Enforcement Officer-Lieutenant for law enforcement agency. 2002 to 2003.

Development and implementation of written knowledge exam and assessment center for Law Enforcement Officer-Sergeant promotion for law enforcement agency. 2001.

Development and implementation of assessment center for Law Enforcement Officer-Sergeant promotion for law enforcement agency. 2000 to 2001.

Development and implementation of assessment center for Corrections Sergeant & Corrections Lieutenant promotion for law enforcement agency. 1999 to 2000.

Management selection assessment for position of President of public relations firm. 1999.

Norming and Validation study of a four-test hospital selection battery for entry-level positions. 1998 to 1999.

Validation Study of test battery for maritime transport company entry-level positions. 1998 to 2000.

Validation Study of written skills test for police officer. 1998

Validation of two parallel forms of writing skills test for police officer. 1998-1999.

Review promotion decision criteria for state police organization. 1998.

Workforce forecast, recruitment, and selection program development for manufacturing company. 1997.

Test validation and fairness analyses conducted for technology/defense contractor. 1996-1997.



Compliance review and development of employee policy and procedures for high-tech manufacturer. 1997.

Panel Interview conducted for selection of Executive Director of non-profit agency. 1996.

Training on validation of selection procedures for an entertainment organization. 1995.

Validation and EEO review of selection criteria for a public utility. 1995.

Development and validation of written promotion examination for Police Sergeant law enforcement agency. 1994 to 1995.

EEO and Fairness analysis for entry-level Fire Fighter examination for a city government. 1994.

Management selection assessment for position of President of public relations firm. 1993.

Testing and evaluation of job applicants for eight positions for a manufacturing company. 1992-1994.

Development and validation of a selection system for six production positions for manufacturing organization. 1992.

Review and analysis of the validity and legal defensibility of a selection system for a community college Police Academy. 1992.

Development and validation of a selection system for four entry-level positions for an electronics company. 1991-1992.

Litigation Consultations:

Expert Witness for Defense Attorney. Disparate impact case. Rainey, Kizer, Reviere & Bell. (Tennessee). 2006 to 2008.

Expert Witness for Plaintiff Attorney. Breach of contract. Gilpin & O-Keefe. (New Mexico). 2006.

Expert Witness for Defense Attorney. Disparate impact case. Berges et al. (Florida). 2000.

Consultation to Plaintiff Attorney. Disparate treatment case. Maxey, Wann, Begley & Fyke (Mississippi). 1999.

Consultation to Plaintiff Attorney. Disparate impact case. Maxey, Wann, Begley & Fyke (Mississippi). 1998 to 1999.



Professional Memberships:

American Evaluation Association (AEA)

American Psychological Association (APA).

International Personnel Management Association (IPMA-HR).

International Personnel Management Association Assessment Council (IPMA-AC).

Society for Human Resource Management (SHRM).

Society for Industrial and Organizational Psychology (SIOP).

Editorial Activities:

Publications Advisory Board Member, Public Personnel Management, 1996-2010

Reviewer, Society for Industrial and Organizational Psychology Annual Conference, 2004-2006

Reviewer, Human Relations, 2004-2005

Panel Reviewer, Drug-Free Communities Support Program, Juvenile Justice Resource Center (JJRC), FY2004

Panel Reviewer, U. S. Department of Justice, Drug-Free Communities Support Program, Juvenile Justice Resource Center (JJRC), FY2002

Panel Reviewer, U. S. Department of Education, Safe Schools/Health Students Initiative, Educational Resources (ESI), FY2001

Panel Reviewer, U. S. Department of Justice, Safe Schools/Health Students Initiative, Juvenile Justice Resource Center (JJRC), FY2001



MARK MINCY
Senior Staff Consultant

Education:

1991 - 1995	University of Central Arkansas Conway, Arkansas	B.S. Psychology
1997 - 1999	University of Arkansas at Little Rock Little Rock, Arkansas	M.A. Industrial/Organizational Psychology
1999 - present	University of Southern Mississippi Hattiesburg, Mississippi	PhD Industrial/Organizational Psychology – ABD

Professional Experience:

**2002 - Present Morris & McDaniel, Inc.
Staff Consultant**

- Developing training initiatives for training current Morris & McDaniel employees in areas of Job Analysis, Law, Validation Strategies, Stress Management, Time Management, Personal Styles, Motivation, Communication Skills, and other management-related topics.
- Developing and delivering training programs for both the public and private sectors.
- Conducting a variety of training programs for and consults with agencies and also the private sector on issues ranging from customer service to communication, coaching and counseling, conflict resolution, negotiation, leadership, individual employee development, team building, and succession planning.
- Consult with clients, instructional designers, and media designers to develop innovative learning strategies and blended learning solutions.
- Managing the analysis, instructional design, project management and content development process for the production of the Morris & McDaniel Job Analysis Certification Program.



- Designing and producing learning solutions that include elements of knowledge sharing and knowledge capture tools, coaching tips, expert interview vignettes, action plan creation tools, assessment instruments, role player simulations, integrated discussion groups, collaborative learning tools and extensive, rich media reference material.
- Managing project teams of subject matter experts, educators, graphic designers, software programmers, technical support staff and marketing product managers in the instructional design and development process: needs assessment, task analysis, lesson design, course production, assessment and implementation of training programs.

Professional Affiliations:

American Society for Training and Development
International Society for Performance Improvement
American Psychological Association
Society for Human Resource Management
Society for Industrial and Organizational Psychology
Psi Chi - (National Honor Society in Psychology)
Deming Institute



JUDITH GEOFFRIAU THOMPSON
Senior Staff Consultant/Licensed Psychometrist

Education:

Masters of Education, May 2001
Psychometry
Mississippi College, Clinton, MS

Bachelor of Science, May 1998
Education
Emphasis: Diagnostic Reading and Fine Arts
Belhaven College, Jackson, MS

Professional Experience:

Morris & McDaniel, Inc., 2000 - Present

- Conducts and assists with psychological evaluations for Protective Service organizations, including security positions in major airport. This task includes the design and structure of the psychological interview, conducting the interview, and consulting with a licensed psychologist, and writing the evaluation.
- Designs and develops ADA compliant valid job descriptions for a State personnel system, including conducting content validation strategies for the job descriptions.
- Designs and conducts performance based and assessment exercises for leadership development and assessment for numerous public sector organizations.
- Designs, conducts, and assists with organizational studies, including leadership assessment, re-organizational studies for several state agencies, including a state department of education, a state department for public welfare, a state department for public service (public utilities) regulation, and a state department for insurance regulation.
- Directs, designs, and serves as editor-in-chief for publishing material for leadership development, career development, study aides, and study guides.
- Designs and conducts Job analysis studies for numerous public and private sector positions.
- Develops and administers performance based exercises including traditional assessment center exercises, situational judgment exercises, scenario exercises, and scenario based multiple choice questions for many public sector organizations.
- Writes test items and conduct item analysis on ability, and knowledge



- based achievement tests.
- Writes and edits technical reports.
- Conducts statistical analyses of data.
- Writes and manages grants.

Thompson Consulting, 2002 - Present

- Administers I.Q., diagnostic, and career tests
- Develops behavior plans and study skill/educational plans

Hinds Community College, 2003 - 2004

- Taught Human Growth & Development course
- Taught General Psychology course

Jackson Public Schools, 1998 - 2000

- Taught 2nd grade at Davis Magnet School
- Taught Honors English at Chastain Middle School

Scholarships and Honors:

Mississippi College

- Graduated Cum Laude, 2001

Belhaven College

- Presidential Academic Scholarship, 1993-1998
- Honors Seminar, 1993-1997
- National Dean's List

Professional Affiliations:

National Association of Psychometrists

Licensors:

Mississippi State Psychometry License - License number 162738



KIMBERLY N. ANDERSON
Senior Staff Consultant/Licensed Psychometrist

Education:

- 2005-2009** Masters of Science in Counseling Psychology with an emphasis in Psychometrics
- 1997-2000** B.A. in Journalism with emphasis in Public Relations;
Minors in English and Psychology; University of Southern Mississippi
- 1995-1997** A.A. in Liberal Arts; Jones County Junior College

Professional Experience:

**2000 - Present Morris & McDaniel
Staff Consultant**

- Served as Project Manager for Quality Workforce Initiative Project with the Mississippi State Personnel Board
- Manages certification testing division
- Develops job analysis and written test review procedures
- Conducts job analyses and job observations
- Serves as liaison to departmental personnel for scheduling and coordination of meetings and assessments
- Facilitates technical conferences, written test review sessions, and exercise development and review meetings
- Develops and administers selection and promotional testing for fire service and departments as well as emergency medical services
- Writes technical reports
- Maintains effective public relations with state agencies and other public and private sector clients
- Assists in the coordination of Special Projects

Professional Affiliations:

Kappa Tau Alpha Journalism Honor Society
Public Relations Student Society of America
Gamma Beta Phi Honor Society
Golden Key Honor Society
Phi Theta Kappa Honor Society

Licensure:

Mississippi State Psychometry License - License number 207395



MOLLY C. MCDONALD
Staff Consultant

Education:

1999 - 2001	University of Southern Mississippi <i>B.A in Political Science, English minor</i>	Hattiesburg, MS
1997 - 1998	University of Alabama	Tuscaloosa, AL

Professional Experience:

2003 – Present Morris & McDaniel
Staff Consultant

Personnel Analyst

- Serves as Assistant Project Manager for Quality Workforce Initiative Project with the Mississippi State Personnel Board
- Assists in the development and scoring of written knowledge-based and entry-level exams for government agencies and private sector organizations
- Participates in the development and administration of performance based assessments for police and fire departments
- Conducts job analyses through technical conferences
- Writes technical validation reports
- Maintains effective public relations with all Mississippi State agencies
- Writes and edits test items

Recognition and Honors:

University of Southern Mississippi

- National Dean's List
- Gamma Beta Phi Honor Society

University of Alabama

- National Dean's List
- Alpha Lambda Delta Honor Society



MAYRA M. PRADO
Staff Consultant

Education:

- | | | |
|--------------------|--|---------------|
| 2012 - 2014 | Kansas State University
<i>M.S in Psychology, Industrial/Organizational Psychology</i> | Manhattan, KS |
| 2005 - 2009 | Belhaven University
<i>B.S in Accounting, Business minor</i> | Jackson, MS |

Professional History:

2009 – Present Morris & McDaniel
Staff Consultant

- Conducts job analysis studies for numerous protective service organizations.
- Analyzes data collected during job analyses to be used in reports.
- Develops and administers performance-based exercises for police and fire departments.
- Assists in the development and scoring of written knowledge-based and entry-level exams for government agencies and private sector organizations.
- Reviews technical reports to ensure quality and accuracy.
- Conducts statistical analyses of data.
- Translates documents to Spanish as needed.

Recognition and Honors:

Belhaven University

- Graduated with Cum Laude honors, 2009
- Accounting Club - President, 2008-2009 and Vice President, 2007-2008
- Achievement in Accounting Award – departmental award presented to one graduating senior
- Academic and Tennis Scholarship, 2005 – 2009



ELIZABETH WOOD
Staff Consultant

Education:

2006 - 2010 **University of Mississippi** Oxford, MS
B.A in Biology, Dual B.A. Degree in Psychology

Professional Experience:

2010 – Present **Morris & McDaniel**
Staff Consultant

- Participates in the development and administration of performance based assessments for police and fire departments
- Develops, reviews, and administers written knowledge exams for law enforcement and fire service departments
- Writes technical validity reports at the conclusion of assessment projects
- Conducts job analyses and job observations for protective service and other public sector clients.

Recognition and Honors:

University of Mississippi

- Dean's List 2006, 2010
- Academic and Tennis Full Scholarship, 2006-2010
- Graduated with 4.0 Psychology GPA



ADAM LESTER

Position	Information Technology Director
Employment History	<u>Morris & McDaniel, Inc., 2013 - present.</u> Adcom Technologies; Founder, CEO/President, 2004 - present. RoofTech; Founder, CEO/President, 2011 - present. Computer Works, LLC; Vice-President, 2010-2013. Construction Services, Inc., Consultant/Project Manager, 2008-2011. HD Entertainment and Gaming, Vice-President Operations, 2009-2010. Hallmark Security, Project Manager/Installation & Service Manager 2003-2004. CDE Integrated Systems, Voice & Data Technician, 2002-2003. MCI Worldcom, Network/Telecom Technician, 2000-2002.
Qualifications & Affiliations	MCSE-Microsoft Certified Solutions Expert CCNA- Cisco Certified Networking Associate Krone TrueNet Certified Certified Ram IV Remote Programmer Dell Certified Systems Engineer Compia Network + Compia A+ Compia Security + CFOT- Certified Fiber Optic Technician
Areas of Expertise	IT strategic and operational planning, information systems security, web development and database management.
Selected Assignments	<p>Assisted in the implementation of technology and security improvements to one of the Defense Department's most powerful supercomputer centers, located at Stennis Space Center, Mississippi.</p> <p>Worked in conjunction with the U.S. Department of Homeland Security to secure the McCoy Federal Building, U.S. Federal Courthouse and several Internal Revenue Service and Social Security Administration offices located across Mississippi.</p> <p>Assisted in the re-engineering of MCI WorldCom's data network.</p> <p>Managed a project to upgrade voice and data systems for the City of Jackson Emergency Communications Center and also made vast improvements to the data network of The City of Oxford.</p> <p>Provided consulting, design, project management, and support services to large corporations including Eaton Aerospace, Nissan, Dell, Wal-Mart, and Target.</p>



APPENDIX F

Recruiting a Diverse Firefighting Force Article





IAFC

INTERNATIONAL ASSOCIATION OF FIRE CHIEFS

Recruiting a Diverse Firefighting Force

*Return to the [March 15, 2013](#) issue of *On Scene**

For many years, the Rochester (N.Y.) Fire Department has faced the challenge of recruiting a diverse firefighting force that better demographically represents our city's population. Successive chiefs have tried various approaches; some were more successful than others, but none seemed to produce positive results over multiple hiring cycles.

Two years ago, we set out to find a better hiring process to address this challenge. The successful answer has two fronts: the right recruiting and the right testing processes.

Our recruiting efforts were largely community-based. We worked with local agencies and churches to reach an audience that wasn't getting the information by traditional means, such as radio and television advertisements.

To find the right testing answer, we reviewed successful techniques and processes from around the county. We found a few cities that were creating a diverse candidate pool to hire from. Two of these cities—Memphis, Tenn., and Kansas City, Mo.—appeared to be hitting the mark. Both of these cities had enlisted the assistance of Morris & McDaniel, a consulting firm specializing in HR management.

Morris & McDaniel's recommended approach was to forgo the New York state written test/physical-ability model that was so familiar to us and instead employ a written test followed by an oral exam. They advised us to save the physical training for the training academy. Their professional trainers could individually tailor workout and nutritional routines to best prepare recruits for the rigors of firefighting.

It took both a leap of faith on our part to break with tradition and some convincing of our governmental leaders and agencies, but we successfully convinced the stakeholders and forged ahead with this new plan. We further refined our own processes and restricted exam eligibility to city residents. This helped ensure that candidates would be people who reflected the Rochester community because they are the Rochester community.

This process proved successful. We have the most diverse candidate pool in the history of the Rochester Fire Department. Furthermore, there's a depth to this diversity that will enable us to seat additional classes with the same amount of representation of races and genders.

I believe it will be easier to sustain this diversity mix as we move forward. A straw poll of the current recruit class indicates that half our recruits came from our new community-based recruitment efforts that involved city churches and community agencies.



The other half was more traditionally recruited through family and friends urging them to apply. As we know, the tradition in the fire service is that we are a close community. Our traditions run deep. The passion for what we do and our commitment to community service is passed from generation to generation.

We hope that the combination of a new testing format and recruiting focus will have allowed some of these traditions to take root across ethnic and gender boundaries, entering families and communities that weren't previously a part of the Rochester Fire Department. In the past, sons were encouraged to follow their fathers and uncles into the fire service. Now, instead of just sons, daughters will also follow. And they won't follow just fathers and uncles, but mothers and aunts as well, into the proud and noble profession of the fire service.

Our job isn't yet complete. The next measure of success will come in May, when we swear in the graduates of the current recruit class. Then we'll know that this forward-thinking combination of recruiting, testing and academy-based physical training has met our goal of providing capable, qualified and diverse firefighters ready to serve our community.

Salvatore Mitrano III is fire chief for the Rochester (N.Y.) Fire Department and a graduate of the Executive Fire Officer Program.

These changes wouldn't have been possible without the dedication and hard work of many others, including:

- Rochester Mayor Thomas Richards
- City Council President Lovely Warren
- City Councilman and Chair of the Public Safety Committee Adam McFadden
- Retired Fire Chief John D. Caufield
- Former Deputy Fire Chief Teresa Everett
- Our many community partners within the city, including many city churches



APPENDIX G

Akron, Ohio Lawsuit Article



Cleveland used testing company whose Akron promotional exams were found to discriminate

Posted by [jdubail](#) December 24, 2008 16:30PM

Cleveland has used the same Pennsylvania-based testing company whose promotional exams were found this week to discriminate against Akron firefighters based on age and race.

A federal jury awarded the 23 firefighters a total of \$1.9 million Tuesday, finding that the exams developed by EB Jacobs were biased against white candidates for captain and black candidates for lieutenant. In both instances, the exams discriminated against officers over 40.

Cleveland has for several years given EB Jacobs exams to police recruits and earlier this year gave a promotional exam prepared by the company. So far, two lieutenants and 37 sergeants have been promoted based on the results.

No lawsuits have resulted, and Cleveland officials said their promotional exam was different from the one used in Akron. But both exams consisted of written and in-person sections, and neither video-recorded the in-person interviews.

The lack of a video record of the interviews figured prominently in the Akron firefighters case. Without a record of the interviews, lawyers argued, test takers and test givers cannot prove the tests were given or graded consistently and accurately.

"If you don't do recordings, you can't appeal the results," Christy B. Bishop, one of the attorneys hired by firefighters in Akron, said Wednesday.

EB Jacobs President and Co-Founder Janet Echemendia could not be reached for comment.

Lucille Ambroz, who oversees testing in Cleveland as secretary of the Civil Service Commission, said Wednesday that city officials thoroughly reviewed the exam in advance to make sure it was not discriminatory.

"We're very comfortable with the test," Ambroz said.

Cleveland recorded oral interviews on promotional exams in the past, but Mayor Frank Jackson's administration decided not to record the interviews on the EB Jacobs exam, Ambroz said.

"There was definitely a decision not to record them," Ambroz said. "You don't really get the true picture of the individual. It [being on camera] makes people nervous."

Cleveland can continue to use the EB Jacobs promotional exam results for promotions through May 2010.

Jackson's administration plans to give tests in 2009 for hiring firefighters and police officers. Officials have yet to select a company to develop that test.

In Akron, city spokesman Mark Williamson said attorneys have not decided whether to appeal the decision in the case before U.S. District Court Judge John R. Adams. He declined to comment further.

Cleveland used testing company whose Akron promotional exams were found to discrimi...

Dennis Thompson, one of the attorneys hired by Akron firefighters, said problems with the exam included test givers presenting questions to candidates in different ways and officials scoring the tests multiple times.

The firefighters only had to prove that the test discriminated, not that the discrimination was intentional, attorneys said.

Eleven of the firefighters who took the lieutenant's exam were given \$81,000 in lost wages. Eleven firefighters who took the captain's exam were awarded \$90,000. Another firefighter who took the captain's exam died while the case was pending; his family will receive \$10,000.

Bishop and Thompson successfully sued Cleveland over a promotional exam in the past, winning a \$650,000 settlement and promotions for 15 black firefighters. That test was not prepared by EB Jacobs.



APPENDIX H

Video vs. Live Research Supporting Video



VIDEO VS. LIVE

RESEARCH SUPPORTING VIDEO

Cunningham and Olshfski (1985) concluded that viewing videotapes should save time and expense for assessors and organizations. The same authors also theorize that evaluations in assessment centers will be improved with the videotaping of exercises.

Buckner (1984) examined the effectiveness and reliability of a videotaped assessment and results of the study indicated that the videotape methodology is reliable.

David Lepard, Albert Edgemon, and Jeanne Burns (1994). **The Use of Video Technology in an Assessment Center Evaluation of Participants: A Pilot Study.** IACP Conference on Assessment Centers and Selection Issues for Law Enforcement. Miami, Florida.

1. **Do assessors report any differences in fatigue levels?**
Videotaped performances resulted in less fatigue than live performance. Assessors reported feeling very fatigued after live; however, no assessor reported feeling very fatigued after video.
2. **Do assessors report any differences in stress levels?**
Videotaped performances, overall, created less stress than live performances. Twice as many assessors reported moderate stress for live performances than those reporting on videotaped performances.
3. **Do assessors report any differences in levels of confidence?**
Use of videotaped performances increased the confidence assessors felt about the accuracy.
4. **Do assessors report any differences in fatigue levels experienced when they prepared exercise report forms?**
Assessors reported less fatigue when preparing reports using video.

David Lepard, Albert Edgemon, and Jeanne Burns (1994). **The Use of Video Technology in an Assessment Center Evaluation of Participants: A Pilot Study.** IACP Conference on Assessment Centers and Selection Issues for Law Enforcement. Miami, Florida.



5. Do assessors report different levels of confidence in the accuracy of the exercise report forms?

Assessors are more confident of exercise report forms produced while viewing taped performances. Three times as many assessors were very confident of their video-based reports as compared to assessors who were confident of the live-based reports.

6. Do assessors report any differences in levels of difficulty experienced when they used video to prepare exercise report forms?

Assessors report less difficulty preparing reports using video.

Findings and Conclusions

It can be concluded that the use of videotaped performances of assessees resulted in a more positive attitude toward assessment work on the part of assessors.

David Lepard, Albert Edgemon, and Jeanne Burns (1994). The Use of Video Technology in an Assessment Center Evaluation of Participants: A Pilot Study. IACP Conference on Assessment Centers and Selection Issues for Law Enforcement. Miami, Florida.



APPENDIX I

DEVELOPING A VALID AND CREDIBLE PROMOTION PROCESS



Developing a Valid and Credible Promotion Process

Richard W. Myers, Chief of Police (ret.)

David M. Morris, HR Consultant

Triggered by the appointment of a new, outside police chief, many internal processes within a major Western U.S. city were examined for both effectiveness and efficiency. It was evident that many within the organization were skeptical about the validity of prior promotions. Having employees believe that some promotions reflected more on organizational friendships than on merit contributed to an overall sense of mistrust between leadership and the rank and file. Additionally, the agency was poised to enter several years' worth of retirements requiring selection of new leadership in many key positions.

In compliance with the City's procurement policies, the agency submitted requests for proposals on the overall process of selecting candidates for promotion, concurrent with forming an internal process improvement committee comprised of stakeholders of various ranks and positions. Once the city selected the firm of Morris & McDaniel, Inc., the process improvement committee worked with the consultants to design a system that rewarded candidates based on real merit and job related factors.

Knowledge was rewarded through the use of a multiple-choice test using internal and external source materials selected by agency command staff. The test was designed to measure true knowledge of job relevant factors, and not to simply reward a good test taker.

Aptitude for supervising, managing, and leading was rewarded through the use of an Assessment Center using external assessors, who were trained on evaluating the behaviorally-based performance of candidates in simulated real-world exercises.

Predictive behaviors from **past performance** that demonstrate how well a candidate will do in the target job were rewarded through the use of a Professional History Portfolio, prepared and submitted by the candidate, to address specific behavioral dimensions important to the job. This exercise was rated by internal assessors who were trained on evaluating the specifically identified behavioral dimensions. The candidates had some input on which approved and trained internal assessors would rate their Professional History Portfolio.

Behaviors that demonstrated the candidates' alignment with the agency mission were rewarded through the use of the Chief's interview. Proper training for the chief and staying focused on behaviorally grounded questions ensured consistency in the questions and required responses that revealed prior predictive behaviors of the candidates.

Each of the above components, based on the job analysis, was given a maximum number of points which the candidate could achieve. All components acted in a true compensatory manner, meaning there were no "cut scores" or multiple hurdles. As a result of all components contributing to a candidate's total score, there were fewer errors typically seen in promotional assessments. Measurement errors such as false positives (candidates who place at the top, but are widely recognized as not qualified to be there) and false negatives (candidates who scored poorly but are widely recognized as top leadership candidates) were either substantially mitigated or eliminated entirely.

Ultimately, the true measure of an improved process is outcome based. In this agency, command staff enjoyed selecting candidates who were clearly identified as most deserving of the added responsibilities of being promoted, and employees throughout the agency enjoyed a heightened sense of trust and confidence in the candidates who assumed new leadership roles. Additionally, the number of employees testing for promotion increased significantly, as the process served an additional and valuable benefit of identifying developmental needs for individual candidates to focus future growth and educational opportunities.

Submitted by Chief Richard W. Myers and David M. Morris, Ph.D., J.D.



A case study provided as part of a report submitted for publication entitled:
Police Human Resource Planning, Gary Cordner, Ph.D. & Annmarie Cordner, Ph.D., Kutztown University,
September 2013



APPENDIX J

Lewis v. City of Chicago Lawsuit



Lewis v Chicago: USSC Reinstates discrimination ruling in favor of 6,000 black applicants for firefighting jobs in the 1990s

May 24, 2010

Washington...The Supreme Court dealt a potentially costly defeat to the city of Chicago Monday, reinstating a discrimination ruling in favor of 6,000 black applicants for firefighting jobs in the 1990s.

In a 9-0 decision, the justices said Chicago had used an entry-level test for the Chicago Fire Department that had a "disparate impact" based on race. And therefore, they said, the city was liable for paying damages to those applicants who had "qualified" scores on the test, but were excluded in favor of those who scored higher.

Earlier this year, a lawyer for black applicants estimated the total damages in the case could reach **\$100 million.**

Monday's ruling is the latest twist in a long-running set of lawsuits over the use of civil service exams for hiring police and firefighters, both in Chicago and elsewhere.

Justice Antonin Scalia, speaking at the court Monday, said he and his colleagues were applying the civil rights laws as written by Congress, not necessarily as he and others think it should be written. Since 1991, federal law has made it illegal for employers to use an "employment practice" that had a "disparate impact on the basis of race."

The Chicago case began in 1995 when 26,000 applicants took a written test to become a city firefighter. Faced with the large number applicants for only several hundred jobs, the city decided it would only consider those who scored 89 or above.

This cut-off score excluded a high percentage of the minority applicants. And after a trial in 2005, U.S. District Judge Joan Gottschall ruled the test had an illegal "disparate impact" because the city had not justified the use of the cut-off score. Experts had testified that applicants who scored in the 70s or 80s were shown to be capable of succeeding as firefighters.

The city did not contest that conclusion, but it won a reversal from the U.S. 7th Circuit Court of Appeals on a procedural technicality. The appellate judges said the applicants had waited too long to sue. They had not sued during the year when the test results were released, but sued only after the scores were used to decide who would be hired.

Civil-rights lawyers appealed on behalf of Arthur Lewis and the other black applicants. They were joined by the Obama administration, which said the federal civil rights law forbids the "use" of discriminatory tests. And by that standard, the suit was filed on time.

The high court agreed Monday in Lewis v. Chicago. "Our charge is to give effect to the law Congress enacted," Scalia said. The class of black applicants had sued at the time the test was used, and it resulted in their not being hired, he concluded.



The unanimous ruling stands in sharp contrast to the deep split within the Supreme Court last year over a case involving white firefighters from New Haven, Connecticut. They sued after they were denied promotions when the city scrapped a test because its impact on black applicants. They won a 5-4 ruling from the Supreme Court saying they were victims of illegal discrimination.

Chicago's case involved the opposite situation. Where New Haven had backed away from using its test results, Chicago pressed ahead and was later sued for using a test that had a discriminatory impact on blacks.

In Monday's opinion, Scalia acknowledged this law creates "practical problems for employers" and can "produce puzzling results." He concluded, however, "it is a problem for Congress, not one that federal courts can fix."

