



**COUNTY OF HENRICO  
DEPARTMENT OF FINANCE  
PURCHASING DIVISION  
CONTRACT EXTRACT  
NOTICE OF AWARD/RENEWAL**

DATE:	May 14, 2025
CONTRACT COMMODITY/SERVICE: <i>(include contracting entity if cooperative)</i>	HCPD Promotional Process Consulting Services
CONTRACT NUMBER:	25-2801-1ARA
COMMODITY CODE:	952.77
CONTRACT PERIOD:	June 1, 2025 through May 31, 2027
RENEWAL OPTIONS:	2-two year renewals
USER DEPARTMENT:	HCPD
Contact Name:	Brian Hewes
Phone Number:	804-501-4803
Email Address:	<a href="mailto:Hew07@henrico.gov">Hew07@henrico.gov</a>
HENRICO COOPERATIVE TERMS INCLUDED:	Yes
SUPPLIER: Name:	Morris and McDaniel
Address:	117 South Saint Asaph St.
City, State:	Alexandria, VA 22314
Contact Name:	Roger McMillin
Phone Number:	703-944-8154
Email address:	<a href="mailto:mcmillinr@morrisandmcdaniel.com">mcmillinr@morrisandmcdaniel.com</a>
ORACLE SUPPLIER NUMBER:	438715
BUSINESS CATEGORY:	Small
PAYMENT TERMS:	Net 45 days
DELIVERY:	Per agreed upon schedule
FOB:	Destination
BUYER: Name:	Amy Anthes, VCO
Title:	Procurement Analyst III
Phone:	804-501-5686
Email:	<a href="mailto:Ant041@henrico.gov">Ant041@henrico.gov</a>

This contract is the result of a competitive solicitation issued by the Department of Finance, Purchasing Division. A requisition must be generated for all purchases made against this contract and the requisition must reference the contract number.



COMMONWEALTH OF VIRGINIA  
**County of Henrico**

**Non-Professional Services Contract  
Contract No. 2801A**

This Non-Professional Services Contract (this "Contract") entered into this 14<sup>th</sup> day of May, 2025, by Morris and McDaniel, Inc., a Mississippi corporation (the "Contractor"), and the County of Henrico, Virginia (the "County").

**WHEREAS** the County has awarded the Contractor this Contract pursuant to Request for Proposals No. 25-2801-1ARA, as modified by Addendum 1 dated February 18, 2025 (the "Request for Proposals"), for Henrico County Police Department Promotional Process Consulting Services.

**WITNESSETH** that the Contractor and the County, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

**SCOPE OF CONTRACT:** The Contractor shall provide the services to the County as set forth in the Contract Documents.

**COMPENSATION:** The compensation the County will pay to the Contractor under this Contract shall be in accordance with the Best and Final Offer (Exhibit A).

**CONTRACT TERM:** The initial Contract term shall be from June 1, 2025 through May 31, 2027. The County may renew the Contract for up to two 2-year terms by giving 30 days' written notice before the end of the term unless Contractor has given the County written notice that it does not wish to renew at least 90 days before the end of the term.

**CONTRACT DOCUMENTS:** This Contract hereby incorporates by reference the documents listed below (the "Contract Documents") which shall control in the following descending order:

1. This Non-Professional Services Contract between the County and Contractor.
2. The General Contract Terms and Conditions included in the Request for Proposals.
3. Contractor's Best and Final Offer dated April 8, 2025 (Exhibit A).
4. Contractor's Original Proposal dated March 13, 2025 (Exhibit B).
5. The Scope of Services included in the Request for Proposals.

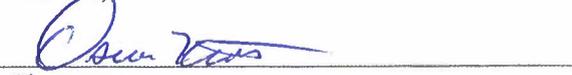
IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound hereby.

Morris and McDaniel, Inc.  
117 South Saint Asaph Street  
Alexandria, VA 22314

  
\_\_\_\_\_  
Signature

County of Henrico, Virginia  
P.O. Box 90775

Henrico, VA 23273-0775

  
\_\_\_\_\_  
Signature

DAVID M. MORRIS, PRES.  
Printed Name and Title

5-14-25  
Date

Oscar Knott, CPP, CPPO, NIGP-CPP, VCO  
Purchasing Director

5/14/25  
Date

APPROVED AS TO FORM

*Shane D. Brown* 5-13-25

Assistant County Attorney

**Anthes, Amy**

---

**From:** David Morris <morrisd@morrisandmcdaniel.com>  
**Sent:** Tuesday, April 8, 2025 8:44 PM  
**To:** Anthes, Amy  
**Cc:** Kimberly Anderson; Molly McDonald; Elizabeth Wood; Susan Dahl; Antoinette Tull  
**Subject:** RE: RFP 25-2801-1ARA

Ms Anthes, I wanted to include Ms Antoinette Tull on the email and she was accidentally left off.

**Ms Anthes:**

We are pleased to forward our detailed responses to the various issues raised by the Evaluation Committee as set out in your recent email. In order to ensure clarity, in each inquiry we have repeated the wording of the Committee inquiry followed by our narrative response. Of course, we also stand by to respond further in any way we can assist the County in making this important decision.

**Roger McMillin, Vice-President  
Mobile 703.944.8154**

\*\*\*\*\*  
\*\*\*\*\*

- What is the timeframe for the orientation video with respect to candidate viewing and does the candidate view the video before or after they apply?

**The orientation video is developed shortly after the job analysis is completed and once Subject Matter Experts (SMEs) have provided the necessary input for content validation—typically within three business days of receiving their input. We then provide a viewing link through the client organization, allowing candidates to watch the video at their convenience.**

**Candidates may submit questions related to the video or process up until 14 working days before the examination. The video itself remains accessible to candidates all the way through to the day of the exam. All candidate questions are addressed by our team no later than 10 working days prior to the examination date and all questions are answered at the same time.**

**We prefer that the jurisdiction provides the video link to true applicants and we kindly request that only true applicants’ questions are submitted.**

- 
- Which personnel typically are involved in reviewing the scoring guidelines and benchmarks?

**Morris & McDaniel follows nationally recognized professional standards for the validation of assessments. Scoring guidelines and benchmarks are reviewed and approved by Subject Matter Experts (SMEs), who are selected based on their qualifications and experience. SMEs include**

individuals who have held the rank for at least two years, have supervised the position for at least six months, or are experienced trainers in the role.

We ensure the SME panel reflects the representativeness and composition of the rank. In addition, every set of exercises and benchmarks is thoroughly reviewed and approved by a Morris & McDaniel senior professional with more than a decade of experience in assessment design and validation who is the lead of this team. This team approach ensures consistency, fairness, and validity throughout the process. We can provide sign-off sheets with dates affirming these procedures

---

- At what stages of the process do the video and virtual meetings pertain?

We strategically use virtual meetings and videos throughout the process to maximize efficiency and minimize cost for our clients—without compromising quality. For example,

- \* orientation videos are used early to inform candidates, and
  - \* virtual meetings are used at key points in project planning and stakeholder engagement,
  - \* all required SME consultations including job analysis, and exercise review.
- 

- How does Morris & McDaniel make certain that the scores are interpreted in the manner intended of the scoring criteria?

Morris & McDaniel employs a rigorous, multi-layered approach to ensure that all candidate scores reflect the scoring criteria as intended:

- 1. Qualified Assessors**

We select assessors who meet or exceed professional standards for assessment center practices. Each assessor is either of the same rank or higher than the rank being evaluated, ensuring they have the appropriate context and expertise to evaluate candidates fairly and accurately.

- 2. Comprehensive Assessor Training**

All assessors undergo a full day of in-depth training focused on the evaluation standards, scoring criteria, and performance benchmarks. This training includes extensive practice with sample materials and calibration exercises. There are exercises in the training that assessors participate in, that provide assurance to our staff that the assessors are meeting standards. In addition, we have a provision that all assessors are made aware in the training that if an assessor does not accept and apply the standards that have been approved by the SMEs from the jurisdiction that they will be politely removed from the process. Our training exceeds the best-practice guidelines recommended by the International Congress on Assessment Centers.

- 3. Consensus-Based Scoring (Modified Delphi Method)**

We use a team-based scoring model that requires three assessors to reach consensus on each candidate's performance. This approach, known as the modified Delphi method, ensures that multiple perspectives are considered, reducing individual bias and improving the reliability and

fairness of the scoring process. It is widely regarded as the most effective scoring method in assessment center methodology.

4. **Morris & McDaniel uses 3 trained assessors.** While professional standards allow only two trained assessors to be used, we use 3 trained assessors to maximize the assurance that standards are being correctly applied.

- What tools has Morris & McDaniel utilized recently to administer testing to personnel on deployment?

Morris & McDaniel is committed to helping jurisdictions meet their obligations under the Uniformed Services Employment and Reemployment Rights Act (USERRA). This law is strictly enforced. To that end, we offer a flexible, proven set of tools and procedures tailored to candidates on military deployment. These tools allow full participation in both written and oral components of the assessment process.

### **Option 1: Concurrent Remote Administration During Deployment**

If the USERRA candidate is able and willing to take the assessment at the same time as other candidates, AND if the jurisdiction is able to obtain the necessary permission and assistance from the Commanding officer, we offer two secure options:

- **Written Component:**

We can send the written test and answer sheet in a sealed, tamper-evident envelope to the candidate's Commanding Officer (CO), provided the jurisdiction obtains the CO's approval. We coordinate directly with the CO and candidate, and the completed test is returned and scored with the rest of the candidate pool.

*Cost: No additional charge.*

- **Virtual Proctoring:**

If the jurisdiction has the necessary CO approval and assistance, the candidate has access to the necessary computer equipment and a suitable testing environment, we provide a dedicated remote proctor to oversee the assessment.

*Cost: \$1,500 per candidate*

- **Oral Component:**

If the oral assessment can be administered at the same time as for other candidates—and if permissions are granted by the CO, the candidate, and other stakeholders, we provide a dedicated remote proctor to deliver and monitor the assessment. We create tailored security agreements and manage all logistics.

*Cost: \$1,200 per candidate*

### **Option 2: Post-Deployment Administration**

If the USERRA candidate is unavailable during the scheduled testing window and requires deferred administration:

- **Written Component (Post-Deployment or Remote):**

With agreement from HR and all stakeholders, we can administer the same written test remotely or after deployment. If done remotely, we provide proctoring and scoring and integrate the score with the final results.

*Cost: \$1,500 per candidate (remote proctor)*

If an onsite administration is required with a Morris & McDaniel proctor present, we invoice only for travel costs and a service fee **not to exceed \$2,500**.

- **Oral Component (Remote or Onsite):**

If remote delivery is allowed and the location is secure with the required equipment, we will administer the oral exercise using a dedicated remote proctor, tailored IT support, and signed security agreements.

*Cost: \$1,200 per candidate (remote proctor)*

If an onsite Morris & McDaniel proctor is required for the oral component, we invoice for travel expenses, reasonable per diem, and a service fee **not to exceed \$2,500**.

Additionally, to ensure fairness and accuracy, Morris & McDaniel will:

- Recruit, train, and proctor assessors
- Provide scoring materials, manuals, and scoring sheets
- Conduct both the primary scoring and a second independent review
- Manage honoraria or travel costs for assessors

*Cost for these services (including second review): Not to exceed \$8,500 plus assessor expenses.*

### **Option 3: Development of Comparable Exercises**

This option offers jurisdictions maximum flexibility, security and fairness to other candidates by allowing us to develop alternate, **comparable exercises** that meet all the same content and validation standards as the original assessment:

- We design exercises tailored to the candidate's availability (onsite or remote), recruit and train assessors, oversee scoring and review, and handle all administrative logistics.
- The final score is calculated and reported in a fully validated and equitable manner.

*Cost: \$15,000 plus documented necessary expenses for any necessary proctor and related costs for written test administration and travel and assessor expenses for administration of the oral assessment process.*

---

### **Best and Final Offer (BAFO) for Pricing**

Pricing is always a difficult issue to deal with. Morris & McDaniel is committed to delivering the highest value in professional assessment services and we are able to produce top quality results by employing, training, and properly rewarding the members of our professional team who deliver the results. On the other hand, having existed for almost fifty years collaborating with public institutions of all size, we are well aware of, and honor, our clients in their commitment to use limited available assets wisely and efficiently in the service of the public they serve. As a result, from our initial determinations of a proposed price for a project, we always start with the notion of offering a price that will meet our needs but without suggesting a pricing structure that would make unfair demands on the resources of our prospective clients, possibly with an eye of lowering that price, if necessary, in the negotiation phase. As a result,

except in the rarest of occasions, our initial price is also our “Best and Final” price. We find that especially true in this instance since our proposed price actually reflects our price for our earlier projects without any attempt to add for inflation or other increased costs since our last effort on behalf of Henrico County. Therefore, we would respectfully restate our initial proposed pricing as our Best and Final price in the firm belief that it represents value to Henrico County and ensures our ability to deliver the quality result that the citizens of the County deserve.

## **TAB 7: PRICING**

*In this tab, Offerors should provide an on site not-to-exceed price to perform all services as specified in the Scope of Services. The price proposal shall break out the various categories of tasks to be performed and should be structured in a manner that provides personnel classifications/ titles (not individual employee names) along with the corresponding hourly rate, multiplied by the estimated hours of the specific task, Additionally, Offerors shall provide an alternate price proposal for remote assessors.*

**HENRICO COUNTY POLICE DEPARTMENT  
RFP #25-2801-1ARA -PROMOTIONAL PROCESS CONSULTING  
PRICE PROPOSAL FOR THE RANK OF SERGEANT**

<b>MILESTONE ONE: Conduct Job Review and Analysis</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	2	\$ 432.60
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		<b>SUB-TOTAL</b>	<b>\$ 623.15</b>
<b>MILESTONE TWO: Best Practices Analysis</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	0	\$ -
		<b>SUB-TOTAL</b>	<b>\$ 865.20</b>
<b>MILESTONE THREE: Design Testing and Assessment Process</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		<b>SUB-TOTAL</b>	<b>\$ 1,246.30</b>
<b>MILESTONE FOUR: Prepare and Distribute Study Guide</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1	\$ 216.30
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		<b>SUB-TOTAL</b>	<b>\$ 597.40</b>
<b>MILESTONE FIVE: Conduct Candidate Orientation Sessions</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	3	\$ 648.90
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		<b>SUB-TOTAL</b>	<b>\$ 839.45</b>
<b>MILESTONE SIX: Administer and Score Written Knowledge Test</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	12	\$ 2,595.60
Senior Tech Staff	\$ 190.55	8	\$ 1,524.40
		<b>SUB-TOTAL</b>	<b>\$ 4,120.00</b>
<b>MILESTONE SEVEN: Administer Oral Assessment Exercises</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	10	\$ 1,905.50
		<b>SUB-TOTAL</b>	<b>\$ 3,635.90</b>
<b>MILESTONE EIGHT: Recruit, Train Raters/Oversee Scoring Structured Oral Process</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	16	\$ 3,048.80
		<b>SUB-TOTAL</b>	<b>\$ 4,779.20</b>

**MILESTONE NINE: Administer patent-protected Second Review to meet requirement for "challenge sessions".**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 1,246.30

**MILESTONE TEN: Provide candidate feedback**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	4	\$ 762.20
		SUB-TOTAL	\$ 1,627.40

**MILESTONE ELEVEN: Deliver final list and required reports**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1.5	\$ 324.45
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 515.00

**TOTAL PROFESSIONAL FEES - SERGEANT \$ 20,095.30**

**PRICE PROPOSAL FOR THE RANK OF LIEUTENANT**

**MILESTONE ONE: Conduct Job Review and Analysis**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	2	\$ 432.60
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 623.15

**MILESTONE TWO: Best Practices Analysis**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	0	\$ -
		SUB-TOTAL	\$ 865.20

**MILESTONE THREE: Design Testing and Assessment Process**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 1,246.30

**MILESTONE FOUR: Prepare and Distribute Study Guide**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1	\$ 216.30
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 597.40

**MILESTONE FIVE: Conduct Candidate Orientation Sessions**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	3	\$ 648.90
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 839.45

**MILESTONE SIX: Administer and Score Written Knowledge Test**

ROLE	HRLY RATE	EST HRS	EST FEE
------	-----------	---------	---------

Project Manager	\$ 216.30	12	\$ 2,595.60
Senior Tech Staff	\$ 190.55	8	\$ 1,524.40
		SUB-TOTAL	\$ 4,120.00
<b>MILESTONE SEVEN: Administer Oral Assessment Exercises</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	10	\$ 1,905.50
		SUB-TOTAL	\$ 3,635.90
<b>MILESTONE EIGHT: Recruit, Train Raters/Oversee Scoring Structured Oral</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	16	\$ 3,048.80
		SUB-TOTAL	\$ 4,779.20
<b>MILESTONE NINE: Administer patent-protected Second Review to meet</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 1,246.30
<b>MILESTONE TEN: Provide candidate feedback</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	4	\$ 762.20
		SUB-TOTAL	\$ 1,627.40
<b>MILESTONE ELEVEN: Deliver final list and required reports</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1.5	\$ 324.45
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 515.00
<b>TOTAL PROFESSIONAL FEES - LIEUTENANT</b>			<b>\$ 20,095.30</b>
<b>OPTION ONE -- ESTIMATED ASSESSOR FEES FOR ON SITE SCORING</b>			
Commercial flight expense, mileage expense, per diem , lodging and related for Sergeant			\$ 16,000.00
Commercial flight expense, mileage expense, per diem , lodging and related for Lieutenant			\$ 12,000.00
<b>TOTAL OVERALL COST OPTION ONE</b>			<b>\$ 68,190.60</b>
<b>OPTION TWO -- ESTIMATED ASSESSOR'S FEES FOR REMOTE PROCTOR SCORING</b>			
Commercial flight expense, mileage expense, per diem , lodging and related for Sergeant			\$ 12,000.00
Commercial flight expense, mileage expense, per diem , lodging and related for Lieutenant			\$ 6,500.00
<b>TOTAL OVERALL COST OPTION TWO</b>			<b>\$ 58,690.60</b>
<b>NOTE ONE: Pricing is based on the jurisdiction furnishing appropriate venues for events contemplated under this process.</b>			

**NOTE TWO: If additional testing is required due to any candidate's exigent circumstances, we will administer the process and integrate the results into the existing rank-ordered list for a flat fee price of \$5,000.00. We will modify existing testing instruments but will not develop new and separate testing instruments. Candidates will be required to sign a security agreement that they will not share information with subsequent test-takers and those candidates taking a delayed test will be required to sign a statement that they have not received any advance notice of test contents.**

# HENRICO COUNTY POLICE DIVISION



## RFP NO.25-2801-1ARA FOR PROMOTIONAL PROCESS CONSULTING SERVICES

Submitted to:

**Amy Anthes, Procurement Analyst III**  
**Commonwealth of Virginia Department of Finance**  
**Henrico County Police Division**  
**8600 Staples Mill Road**  
**P.O. Box 90775**  
**Henrico, VA 23273-0775**

**MARCH 18, 2025**



**Morris & McDaniel, Inc.**  
*Management Consultants*

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

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

Washington, D.C.

New Orleans, LA

Memphis, TN

Jackson, MS

## TABLE OF CONTENTS

<b>TAB 1: INTRODUCTION AND SIGNED FORMS</b> .....	3
<b>TAB 2: STATEMENT OF THE SCOPE</b> .....	7
Executive Summary .....	8
Ability to Provide Major Services of the Kind Requested .....	9
Our Firm’s Professionals .....	9
Outline of What Differentiates Morris & McDaniel from Other Firms.....	9
<b>TAB 3: DEFAULT, TERMINATION, AND BARRED CERTIFICATION STATEMENT PURSUANT TO SECTION VI, ITEMS L (3), L (4), AND L (5)</b> .....	11
<b>TAB 4: FUNCTIONAL REQUIREMENTS</b> .....	13
<b>TAB 5: SERVICE APPROACH / IMPLEMENTATION OF SERVICES</b> .....	18
<b>Project Concept and Solution</b> .....	19
Background and Issues .....	19
Study Objectives.....	19
Proposed Services-Work Plan.....	20
1. Project Planning Session (Orientation meeting) .....	21
2. Review Existing Job Analysis Data and Relevant Literature.....	22
3. Conduct a Job Analysis for the Tested Ranks .....	22
4. Recommend Promotional Process for the Tested Ranks .....	28
5. Develop and Draft the Examination Plan .....	29
6. Submit Draft Examination Plan to County Staff and Appropriate Decision- Makers for Approval.....	30
7. Examination Schedule .....	30
8. Develop Reading List Sources.....	30
9. Assist with Written Test Announcement.....	30
10. Develop and Conduct Candidate Orientation Sessions .....	31
11. Develop Written Tests, and Assessment Center Exercises 33	
12. Review by Approved Subject Matter Experts.....	36
13. Develop Camera Ready Copy for Reproduction Purposed.....	36
14. Conduct the Administration of the Written Exam Administration.....	36
15. Analyze Test Results and Conduct All Appropriate Analysis for Adverse Impact.....	37
16. Candidate Review and Appeal .....	37
17. Submit List of Candidates Screened for the Performance-based Exercises....	38
18. Assist with performance-based assessment announcement .....	38
19. Assessor selection and training .....	38
20. Administration of the performance-based exercises .....	40
21. Monitor the Assessment Scoring Procedures .....	41
22. Candidate Feedback.....	41
23. Presentation of Results.....	42
24. Submission of Final Validation (Technical) Report .....	42
Maintain Validity Evidence for Judicial Review .....	42
Computer Capability.....	42



**TABLE OF CONTENTS CONTINUED**

Unexpected Issues and/or Changes .....	43
Security of Materials .....	43
County/Department Involvement .....	43
A Delineation of the Consultant's and the County's/Police Department's Responsibilities/Deliverables .....	44
Time Schedule .....	45
Gantt Chart .....	46
<b>TAB 6: EXPERIENCE, QUALIFICATIONS, REFERENCES, AND FINANCIAL CAPACITY .....</b>	<b>47</b>
Description of Our Firm .....	48
<b>Company Profile .....</b>	<b>48</b>
Professional Qualifications of Morris & McDaniel, Inc. ....	48
Written Multiple Choice Exams .....	49
Assessment Centers and Practical Exams .....	50
Job Analysis .....	50
Legal, Regulatory, and Professional Issues .....	50
Examination Experience .....	52
Client References and Professional Experience in Providing Similar Consulting Services .....	52
Grievances/Complaints/Litigation .....	58
Insurance .....	58
Indemnification .....	58
Statement of Financial Condition .....	59
Employment Discrimination Law .....	59
<b>Staff Qualifications .....</b>	<b>60</b>
Project Manager and Staffing Plan .....	60
Personnel Background and Qualifications .....	61
Project Organization Chart .....	61
Morris & McDaniel Team of Staff Members .....	61
Subcontracting .....	62
<b>TAB 7: PRICING .....</b>	<b>64</b>
<b>TAB 8: APPENDICES .....</b>	<b>65</b>
<b>RELEASE BY THE CITY OF NEW YORK STATING WE WERE THE ONLY CONSULTANT THAT ASSISTS IN ALL OF THEIR TESTING INCLUDING NEW YORK PD .....</b>	<b>Appendix A</b>
<b>DCAS A+ RATING OF MORRIS &amp; MCDANIEL'S SERVICES .....</b>	<b>Appendix B</b>
<b>PROFESSIONAL RESUMES .....</b>	<b>Appendix C</b>
<b>ORDER BY JUDGE WALTER J. GEX, III, UNITED STATES DISTRICT COURT FOR THE SOUTHERN DIVISION, SEPTEMBER 21, 2004 .....</b>	<b>Appendix D</b>
<b>FINANCIAL CAPACITY .....</b>	<b>Appendix E</b>
<b>TAB 9: ASSUMPTIONS .....</b>	<b>103</b>
<b>TAB 10: EXCEPTIONS .....</b>	<b>105</b>



## TAB 1: INTRODUCTION AND SIGNED FORMS

*In this tab, the following items should be provided:*

- a. *Cover Letter – On company letterhead, signed by a person with the corporate authority to enter into contracts in the amount of the proposal.*
- b. *Proposal Signature Sheet – **Attachment A***
- c. *Business Classification Form – **Attachment B***
- d. *Virginia State Corporation Commission Registration Information – **Attachment C***
- e. *Proprietary/Confidential Information – **Attachment D***





---

**Morris & McDaniel, Inc.**  
**Management Consultants**

117 S. Saint Asaph Street  
Alexandria, VA 22314  
Telephone: (703) 836-3600  
Facsimile: (703) 836-4280  
[www.morrisandmcdaniel.com](http://www.morrisandmcdaniel.com)

March 18, 2025

Amy Anthes, Procurement Analyst  
Commonwealth of Virginia Department of Finance

Dear Ms. Anthes Knott:

Morris & McDaniel is pleased to team with with Ms. Antoinette Tull and submit our proposal to design, validate and supply a promotional process that incorporates best practices currently used in the field of testing, for Henrico County Police Department to assist in identifying incumbents who are best qualified for promotion for the ranks of Sergeant and Lieutenant. It is our understanding that the purpose of the testing process is to provide a list of suitable candidates that will be ideally maintained for two years. We understand that there are approximately 90 candidates (Sergeant 60 and Lieutenant 30,) candidates eligible to compete for the various ranks. Our firm has signed and submitted all required forms.

We know our firm has the depth of professional experience in protective service work required for this project. Our record of superior performance extends over forty-eight (48) years. According to a release from the City of New York, Morris & McDaniel is the only firm that provides testing services to the New York Police and Fire Department (Appendix A); furthermore, we received an A+ grading from the City on our assessment work (Appendix B). Some of our law enforcement clients include New York Police Department, Durham Police Department, Norfolk Police Department, Newport News Police Department, Jackson Police Department, and Richmond Police Department. We are also under contract to perform numerous fire and police projects for the City of New York. Among the many clients around the country that we have served well, we would be pleased to continue including Henrico County. We would be proud to serve you in this capacity, and we are enthusiastic about the opportunity to demonstrate our abilities to render the highest caliber of professional service.

Joe Nassar, Co-Owner and Vice President, or I, as Co-Owner and President, have the designated authority to enter into contract discussions and negotiations and sign a contract on behalf of Morris & McDaniel. Either principal can be contacted during the period of evaluation and act promptly on contract execution if awarded the project. These individuals can be contacted at:



Amy Anthes, Procurement Analyst  
Commonwealth of Virginia Department of Finance  
Page 2

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

Address: 117 South Saint Asaph Street  
Alexandria, VA 22314  
Telephone: 703-836-3600  
Fax: 703-836-4280  
Email:  
[contact@morrisandmcdaniel.com](mailto:contact@morrisandmcdaniel.com)

**Joe Nassar, M.P.A., Vice President**

Address: 117 South Saint Asaph Street  
Alexandria, VA 22314  
Telephone: 703-836-3600  
Fax: 703-836-4280  
Email:  
[contact@morrisandmcdaniel.com](mailto:contact@morrisandmcdaniel.com)

According to the RFP, HCPD currently has a timeline of the first promotional process opening no later than May 2025, with a list of promotable candidates submitted to the Chief of Police, no later than December 31, 2025. Morris & McDaniel understands that time is of the essence and is prepared to immediately start working on this project upon contract award. Our firm will work closely with the County toward mutually agreeable project goals and schedules to meet the target dates noted in the RFP. We have paid particular attention to the expressed needs of Henrico County Police Department as outlined in the RFP, and we believe this proposal is responsive to the information you require and will demonstrate why Morris & McDaniel will best serve the needs of Henrico County Police 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 are frequent invited speakers at CALEA, Major City Chiefs, FBI National Academy and FBI retrainers and other police conferences. 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, 1985). 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 48 years of providing protective service assessment work, our assessment procedures have been successful in enfranchising minorities and females into protective service positions, while emphasizing merit-based principles.

**Promotional 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**

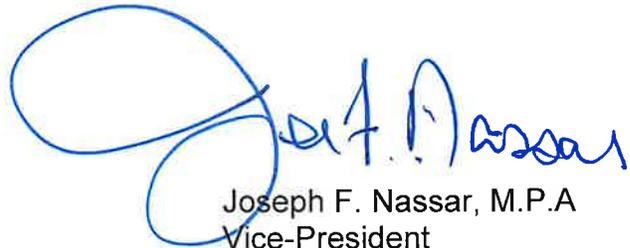
The principals, associates, and staff who will serve you have extensive experience and expertise in conducting this type of project. Our project team will meet your needs and is unmatched both in extensive professional experience and professional training. The resumes of these individuals are included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

In the final analysis, the credentials, experience and reputation that we describe and offer in this proposal 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.  
President



Joseph F. Nassar, M.P.A  
Vice-President

DMM/bp  
Enclosures

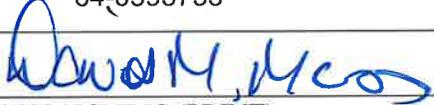


## ATTACHMENT A PROPOSAL SIGNATURE SHEET

My signature certifies that the proposal as submitted complies with all requirements specified in this Request for Proposal (“RFP”) No. 25-2801-1ARA Henrico County Police Department Promotional Process Consulting Services

My signature also certifies that by submitting a proposal in response to this RFP, the Offeror represents that in the preparation and submission of this proposal, the Offeror did not, either directly or indirectly, enter into any combination or arrangement with any person or business entity, or enter into any agreement, participate in any collusion, or otherwise take any action in the restraining of free, competitive bidding in violation of the Sherman Act (15 U.S.C. Section 1) or Sections 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

I hereby certify that I am authorized to sign as a legal representative for the business entity submitting this proposal.

LEGAL NAME OF OFFEROR (DO <u>NOT</u> USE TRADE NAME):	
Morris & McDaniel, Inc.	
ADDRESS:	
117 South Saint Asaph Street, Alexandria, VA 22314	
FEDERAL ID NO: 64-0595753	
SIGNATURE: 	
NAME OF PERSON SIGNING (PRINT): David M. Morris, Ph.D., J.D., MBA	
TITLE: President	
TELEPHONE: 703-836-3600	
FAX: 703-836-4280	
EMAIL ADDRESS: contact@morrisandmcdaniel.com	
DATE: March 13, 2025	

## ATTACHMENT B BUSINESS CATEGORY CLASSIFICATION FORM

Company Legal Name: Morris & McDaniel, Inc.

This form completed by: Signature:  Title: President

Date: March 13, 2025

**PLEASE SPECIFY YOUR BUSINESS CATEGORY BY CHECKING THE APPROPRIATE BOX(ES) BELOW.**

(Check all that apply.)

- SMALL BUSINESS
- WOMEN-OWNED BUSINESS
- MINORITY-OWNED BUSINESS
- SERVICE-DISABLED VETERAN
- EMPLOYMENT SERVICES ORGANIZATION
- NON-SWaM (Not Small, Women-owned or Minority-owned)

**SUPPLIER REGISTRATION** – The County of Henrico encourages all suppliers interested in doing business with the County to register with eVA, the Commonwealth of Virginia’s electronic procurement portal, <http://eva.virginia.gov>.

eVA Registered?  Yes  No

If certified by the Virginia Minority Business Enterprises (DMBE), provide DMBE certification number and expiration date.

\_\_\_\_\_ NUMBER \_\_\_\_\_ DATE

### DEFINITIONS

For the purpose of determining the appropriate business category, the following definitions apply:

**"Small business"** means a business, independently owned and controlled by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or annual gross receipts of \$10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business.

**"Women-owned business"** means a business that is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women.

**"Minority-owned business"** means a business that is at least 51 percent owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals.

**"Minority individual"** means an individual who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:

1. "African American" means a person having origins in any of the original peoples of Africa and who is regarded as such by the community of which this person claims to be a part.
2. "Asian American" means a person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Mariana Islands, the Philippines, a U.S. territory of the Pacific, India, Pakistan, Bangladesh, or Sri Lanka and who is regarded as such by the community of which this person claims to be a part.
3. "Hispanic American" means a person having origins in any of the Spanish-speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who is regarded as such by the community of which this person claims to be a part.
4. "Native American" means a person having origins in any of the original peoples of North America and who is regarded as such by the community of which this person claims to be a part or who is recognized by a tribal organization.

**"Service disabled veteran business"** means a business that is at least 51 percent owned by one or more service disabled veterans or, in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more individuals who are service disabled veterans and both the management and daily business operations are controlled by one or more individuals who are service disabled veterans.

**"Service disabled veteran"** means a veteran who (i) served on active duty in the United States military ground, naval, or air service, (ii) was discharged or released under conditions other than dishonorable, and (iii) has a service-connected disability rating fixed by the United States Department of Veterans Affairs.

**"Employment services organization"** means an organization that provides community-based employment services to individuals with disabilities that is an approved Commission on Accreditation of Rehabilitation Facilities (CARF) accredited vendor of the Department of Aging and Rehabilitative Services.

**ATTACHMENT C**  
**Virginia State Corporation Commission (SCC)**  
**Registration Information**

**The Offeror:**

is a corporation or other business entity with the following SCC identification number:  
F043971 **-OR-**

is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Bidder in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Bidder's out-of-state location) **-OR-**

is an out-of-state business entity that is including with this bid/proposal an opinion of legal counsel which accurately and completely discloses the undersigned Bidder's current contracts with Virginia and describes why those contracts do not constitute the transaction of business in Virginia within the meaning of §13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

Please check the following box if you have not checked any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for bids:

**ATTACHMENT D**  
**PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION**

NAME OF OFFEROR: Morris & McDaniel, Inc.

Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Va. Code § 2.2-4342(F) in writing, either before or at the time the data or other materials are submitted. The Offeror must specifically identify the data or materials to be protected including the section(s) of the proposal in which it is contained and the pages numbers, and state the reasons why protection is necessary. A summary of trade secrets and proprietary information submitted shall be submitted on this form. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. Va. Code § 2.2-4342(F) prohibits an Offeror from classifying an entire proposal, any portion of a proposal that does not contain trade secrets or proprietary information, line item prices, or total proposal prices as proprietary or trade secrets. If, after being given reasonable time, the Offeror refuses to withdraw such classification(s), the proposal will be rejected.

SECTION/TITLE	PAGE NUMBER(S)	REASON(S) FOR WITHHOLDING FROM DISCLOSURE
Proposed Services - Work Plan	29-54	Do not wish to disclose our firm's methodology outside the scope of the proposal review
Client References	60-66	Do not wish to disclose firm's clients outside the scope of the proposal review
Appendix D	116-121	Do not wish to disclose financials outside the scope of the proposal review



COMMONWEALTH OF VIRGINIA  
**County of Henrico**

DEPARTMENT OF FINANCE  
Oscar Knott, CPP, CPPO, VCO  
Purchasing Director

Questions and Answers

**Date:** February 28, 2025  
**Request for Proposal:** 25-2801-1ARA Henrico County Police Department Promotional Process Consulting Services  
**Receipt Date/Time:** March 18, 2025 at 11:00 A.M.  
**Subject:** Question and Answers

Ladies/Gentlemen,

Please see the following question(s) and response(s):

**Question:** What reading list sources would the agency like to have on the written exam for all ranks?

**Response:** Proposed reading list for 2026-2027 promotional process is attached for the ranks of Sergeant and Lieutenant. Only 1 source is outside reading material, the book Extreme Ownership by Jocko Willink. The rest are internal policies and directives.

**Question:** Can you supply the reading lists for all ranks for the last three previous examinations?

**Response:** Please find attached the reading lists for the Sergeants and Lieutenants process for 2022-2023 and 2024-2025. The process prior to that there was no written assessment or list.

All other specifications and General Terms and Conditions shall remain the same.

Failure to acknowledge this addendum may result in your proposal being declared non-responsive.

Sincerely,

Amy Anthes, VCO  
Procurement Analyst III  
Ant041@henrico.gov

**ACKNOWLEDGEMENT:**

Signature:

David M. Morris

Print Name:

DAVID M. MORRIS

Company:

MORRIS & McDaniel, INC.

Date:

3/17/25



**ADDITIONAL REMARKS SCHEDULE**

AGENCY <b>Fisher Brown Bottrell Insurance</b>		NAMED INSURED <b>Morris and McDaniel, Inc.</b> 117 South Saint Asaph Street Alexandria, VA 22314	
POLICY NUMBER <b>SEE PAGE 1</b>			
CARRIER <b>SEE PAGE 1</b>	NAIC CODE <b>SEE P 1</b>	EFFECTIVE DATE: <b>SEE PAGE 1</b>	

**ADDITIONAL REMARKS**

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

**Description of Operations/Locations/Vehicles:**  
RFP No. 25-2801-1ARA - Promotional Process Consulting Services, Henrico County Police Department

## **TAB 2: STATEMENT ON THE SCOPE**

*In this tab, Offerors, in concise terms, shall state their understanding of the Scope of Services requested by this RFP in Section II.*



*7. Firm should be regularly engaged in providing the services solicited in this RFP for no less than four (4) years.*

## **EXECUTIVE SUMMARY**

Through a Request for Proposals (RFP #25-2801-1ARA), Morris & McDaniel learned that decision-makers in Henrico County Police Division are seeking outside assistance from qualified providers to provide police promotional exams for the ranks of Sergeant and Lieutenant. It is our understanding that the County has been exploring ways to improve the promotional testing and selection process with a goal of creating a promotional process that identifies the most suitable candidate for each position in each rank. HCPD requires a qualified and experienced firm to design, validate and supply a promotional process that is transparent, fair, valid, and defensible in any legal or administrative proceeding. The promotional process will ultimately provide a list of suitable candidates that will be ideally maintained for two years. Based on the last four years, the estimated number of candidates participating in each annual promotional process is 60 Sergeants and 30 Lieutenants. Our firm understands that we will be regularly engaged in providing the services solicited in the RFP for no less than four (4) years. Morris & McDaniel has been providing these services since our firm was established in 1976.

As stated in the RFP, HCPD currently has a timeline of the first promotional process, resulting from this RFP, opening no later than May 2025, written test the first week of October, assessment exercises the third or fourth week of October, with a list of promotable candidates submitted to the Chief of Police, no later than December 31, 2025.

All work conducted shall be developed in accordance and with great deference to the professional standards outlined in the Federal Uniform Guidelines on Employee Selection Procedures. Morris & McDaniel can accomplish these goals for Henrico County Police Division. We offer valid, fair, non-discriminatory 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.

Morris and McDaniel has reviewed all requirements as stated in the Section II Scope of Services and is confident that we can meet the needs of the Henrico County Police Division. The following proposal will outline our firm's qualifications and the professional services we can provide to address Henrico County Police Division' testing requirements as well as a detailed explanation of experience we possess to ensure professional capability in incorporating both job relatedness and validity. Having over 48 years of experience in developing, administering, and scoring job-related examinations, Morris & McDaniel is both knowledgeable and well-resourced in



determining and fulfilling the testing needs of each individual client. This emphasis on personal service as well as the “end-product” sets us apart from other 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. We know of no other firm that can match our history of service or success in preventing litigation or success when litigation occurs.

***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 have provided consulting services to numerous public safety departments, including, DeKalb County Fire, New York Police (NYPD), Austin Fire Department, Washington DC Fire Department, Chesapeake Fire Department, Orange County Fire Rescue Department, Atlanta Fire Department, Memphis Fire Department, Houston Fire Department, and San Francisco Fire Department, and numerous police departments and law enforcement organizations, including New York City Police Department, Richmond Police Department, Newport News Police Department, Chesapeake Police Department, Memphis Police Department, New Haven Police Department, and Stamford Police Department. We have 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***

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 and a MBA from Yale. 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.

Morris & McDaniel staff members will work as a team to complete the tasks required by Henrico County Police Division. The personnel presented in the following paragraph have successfully completed projects with similar scopes of work for various police departments, including New York Police Department, Durham Police Department, Norfolk Police Department, Newport News Police Department, Jackson Police Department, and Richmond Police Department.

Antoinette Tull PHR HRPM, Lana Whitlow, Ph.D., Judith Thompson, M.Ed., Jeffrey Rain, Ph.D., Kimberly Anderson, M.S., and Mark Mincy, Ph.D. will serve as Senior Staff Consultants. Molly McDonald, B.A., Mayra Prado, M.S., Elizabeth Wilson, B.A., will assist the project as Staff Consultants and Steven Watkins, Information Technology Director, will implement and manage all technology needs. These personnel are all full-time employees of Morris & McDaniel.



## **Outline of What Differentiates Morris & McDaniel from Other Firms**

Our firm has distinguished itself from other firms by its outstanding record in creating both legally defensible and valid 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 of 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 the firm asked to come into Akron, OH after the litigation on their promotional procedures, which they lost, cost the City almost 2 million dollars.
- Our firm was asked by Austin Fire Department to assist them in resolving a Federal Consent Decree and was resolved in less than 2 years.

Morris & McDaniel, Inc., is not a subsidiary of any parent company. Our firm will perform this contract for Henrico County Police Division as a corporation. We are comprised of no other legal entities.

*The steps we propose for consideration are:*

1. Project planning session (orientation meeting)
2. Review existing job analysis data and relevant literature
3. Conduct a job analysis for the tested ranks
4. Recommend promotional process for the tested ranks
5. Develop and draft the examination plan
6. Submit draft examination plan to County staff and appropriate decision-makers for approval
7. Examination schedule
8. Develop reading list sources
9. Assist with written test announcement
10. Develop and conduct candidate orientation sessions
11. Develop Written Tests, and Assessment Center Exercises
12. Review by approved subject matter experts
13. Develop camera ready copy for reproduction purposes
14. Conduct the administration of the written exam administration
15. Analyze test results and conduct all appropriate analysis for adverse impact
16. Candidate Review and Appeal
17. Submit list of candidates screened for the performance-based exercises
18. Assist with performance-based assessment announcement
19. Assessor selection and training
20. Administration of the performance-based exercises
21. Monitoring the assessment scoring procedures
22. Candidate feedback
23. Presentation of results
24. Submission of final validation (technical) report



**TAB 3: DEFAULT, TERMINATION, AND BARRED CERTIFICATION STATEMENT PURSUANT TO SECTION VI, ITEMS L(3), L(4), AND L(5)**

*In this tab, Offerors shall certify (i) that it has not defaulted on any government contract in the last five years, (ii) that no government has terminated a contract with the Offeror for cause in the last five years, and (iii) that neither it nor any of its officers, directors, partners, or owners is currently barred from participating in any procurements by any federal, state, or local government body. If any of the aforementioned certifications cannot be made, Offerors must explain in reasonable detail.*



Morris & McDaniel, Inc. certifies the following:

(i) Morris & McDaniel has not defaulted on any government contract within the past five years. It has fulfilled all contractual obligations in accordance with the terms and conditions agreed upon with federal, state, and local government entities.

(ii) No government entity has terminated a contract with Morris & McDaniel for cause within the past five years. The Offeror has maintained a record of compliance with contractual requirements and has not engaged in any conduct that would warrant termination for cause by a government agency.

(iii) Neither Morris & McDaniel nor any of its officers, directors, partners, or owners is currently barred, suspended, or otherwise prohibited from participating in procurements by any federal, state, or local government body. Morris & McDaniel affirms that all individuals in key leadership and ownership roles remain in good standing with government procurement authorities and are eligible to engage in contracting activities.



## **TAB 4: FUNCTIONAL REQUIREMENTS**

*In this tab, Offerors should discuss:*

- a. Your promotional process for onsite assessors and remote assessors that will be transparent, fair, valid, and legally and administratively defensible;*
- b. How your promotional process is in accordance with the Uniform Guidelines on Employee Selection Procedures (<https://uniformguidelines.com>), Henrico County Police Division policy and procedures and County of Henrico Personnel Policies and Procedures;*
- c. Your response time and reconciliation process to all inquiries via email or telephone in a timely manner;*
- d. How your firm maintains communication to HCPD on a continuous basis throughout the contract; and,*
- e. How your firm addresses testimony for legal or administrative proceedings if the promotional process including written exam, if applicable, and assessment center process is challenged.*

### **SCOPE OF SERVICES**

#### **A. General Requirements**

- 1. Provide a promotional process for onsite assessors and remote assessors that will be transparent, fair, valid, and legally and administratively defensible;*
- 2. Provide a promotional process that is in accordance with the Uniform Guidelines on Employee Selection Procedures (<https://uniformguidelines.com>), Henrico County Police Division policy and procedures and County of Henrico Personnel Policies and Procedures;*
- 3. Respond to all inquiries via email or telephone in a timely manner;*
- 4. Communicate on a continuous basis throughout the contract; and,*
- 5. Provide testimony for any legal or administrative proceeding if the promotional process including written exam, if applicable, and assessment center process is challenged.*



Morris & McDaniel will provide trained assessors to observe each candidate's performance and evaluate candidates' behavior on predefined dimensions that relate to success on the job. Morris & McDaniel recognizes the importance of a well-trained cadre of assessors to ensure the successful operation of public safety performance-based assessment programs. Morris & McDaniel shall identify and coordinate the selection of assessors for each promotional process. We will work in consultation with HCPD to develop qualifying/disqualify criteria, recommended characteristics, and qualification for assessors chosen to score, rate or rank candidates during the selection process. We will train each assessor and develop any materials needed to train. The core of this training will be practice and feedback, using the actual exercises to be used and the associated assessor report forms.

Dr. Morris, Judge McMillin, or Mr. Nassar and one or more staff members from our firm will be on-site to conduct the assessor training and to monitor the entire scoring activity process. The training and scoring of the practical exam will be tailored to the exercises, and be very observational /behavior based.

For the Assessment Center exercises, Morris & McDaniel gives deference to the procedures outlined for assessor training in the Guidelines and Ethical Considerations for Assessment Center Operations.

Morris & McDaniel, Inc. recommends a diverse group of assessors, equal to the tested rank or higher and including ethnic, racial, and gender diversity, be recruited and trained to rate and assess the tested rank. We will conduct a training session for the assessors immediately prior to the assessment scoring activities.

A sample table of contents for assessor training is given 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 the training and scoring activities, each assessor will receive a written reference manual (assessor 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 exercises 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 final eligibility list may be based on the assessment process and the score on the written test. The scores are typically converted to a 100-point scale.

During the training session, 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 Henrico County Police Division assessment program.

For each exercise, a minimum of one (1) team of three (3) assessors of the four (4) on the assessor panel will score each candidate testing for a specific rank. No one (1) assessor will be responsible for solely observing or evaluating candidates on any exercise. Morris & McDaniel staff has 48 years of experience assisting in and recruiting assessors from departments across the United States and planning and scheduling the recommended number of assessors for the number of candidates testing.

Morris & McDaniel shall be provided with existing information concerning the HCPD organization and the target jobs (job descriptions, class specifications, Henrico County Police Division policy and procedures, County of Henrico Personnel Policies and Procedures, training manuals, Standard Operating Procedures, etc.) and will review provided materials. We will gather and glean the tasks, duties and responsibilities, knowledge, skills, and abilities for effective and ineffective job behavior and submit for review and accuracy by the HCPD's internal subject matter experts. In addition, Morris & McDaniel shall conduct a best practice analysis for promotional processes and assessment centers within the law enforcement industry including, but not limited to, the Virginia Association of Chiefs of Police (VACP), International Association of Chiefs of



Police (IACP), and Commission on Accreditation for Law Enforcement Agencies (CALEA). The review of provided materials and best practice analysis will be used in the development of the job knowledge process, evaluation dimensions, and assessment center exercises to ensure they reflect the requirements of the target rank. This analysis shall provide the method for content validation.

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 the assessments 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 create a content validation report 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, Inc. uses a Technical Conference of Subject Matter Experts that has proven to be extremely effective in maximizing the quality of job analytic data for fire, police, sheriff, and corrections officers 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, Inc. team is well-equipped to assist Henrico County Police Division in addressing all critical issues. Certain job analysis procedures and methods are more appropriate for a given assessment system. Further, sufficient biographical information must be gathered for the Subject Matter Experts to document their level of expertise.

The Morris & McDaniel, Inc. 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)

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 municipalities, 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 assessment procedures occurs within a complex context of legal/regulatory and professional requirements. County and Police officials should select a consultant who has a clear understanding of these multi-faceted requirements to establish a legally and professionally defensible assessment process that will be fair and equitable to all candidates.

Morris & McDaniel is committed to responding to all inquiries via email or telephone in a timely manner. Our team will ensure that all inquiries are acknowledged and addressed promptly.

Morris & McDaniel will maintain continuous communication with HCPD throughout the duration of the contract through multiple channels, including regular status updates, scheduled meetings, and a dedicated point of contact. In using these multiple channels, it ensures seamless coordination, timely updates, and prompt resolution of any concerns, thereby fostering an effective and collaborative working relationship.

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. Costs associated with expert testimony are provided in the price section.



## **TAB 5: SERVICE APPROACH/IMPLEMENTATION OF SERVICES**

*In this tab, Offerors should provide, in detail their approach to fulfilling the scope of services being solicited by this RFP and demonstrate their compliance with the requirements in the Scope of Services. If subconsultants are to be utilized, provide the services that they will be providing. In this tab, for Offerors should also provide:*

- a. The proposed project plan and timeline of each deliverable demonstrating a commitment to meet the December 31, 2025 date reference in Section I(B);*
- b. Written and video examples of assessments for each level;*
- c. Emergency protocols and contingencies for dealing with delivering services during inclement weather;*
- d. A list of any space, equipment and access to location requirements of HCPD.*



## PROJECT CONCEPT AND SOLUTION - Need for Study

It is our understanding the Henrico County Police Division has a need for assistance in the development, validation, and suppliance of a valid, job-related promotional process to be used in making police promotional decisions; specifically, for the positions of Sergeant and Lieutenant. It is our understanding that the purpose of the testing process is to provide a list of suitable candidates that will be ideally maintained for two years. We understand that there are approximately 90 candidates (Sergeant 60 and Lieutenant 30) candidates eligible to compete for the various ranks. We will work closely with the County and police department to design and administer a fair exam.



### BACKGROUND AND ISSUES

Fire service personnel of the highest caliber are essential to ensure top-level quality services to the public and Henrico County Police Division. There has been an increasing recognition on the part of decision makers that procedures used for promotional purposes must assess not only technical job knowledge, but also other knowledges, skills, and abilities more easily assessed with behavioral-based exercises, such as assessment centers, oral boards, etc. Only through selecting the correct procedure(s) can protective service organizations be assured of selecting promotional personnel to effectively meet the public service challenges of the future.

In developing a promotional system for County's police department, it is important to base the promotional system design not only upon what has worked for similar organizations in the past, but also upon specific and unique characteristics of the protective service organization in question.

### Study Objectives

The goal of this project is to develop transparent, fair, valid and legally and administratively defensible promotional procedures for the positions of Sergeant and Lieutenant for Henrico County Police Division. We shall design assessment procedures which are:

- **Legally Defensible**, giving deference to the requirements of the Uniform Guidelines on Employee Selection Procedures and the requirements of the Henrico County Police Division Personnel Rules and Regulations, where applicable.
- **Professionally Defensible**, giving deference to the requirements of the professional psychological standards, specifically the Standards for Educational and Psychological Testing and the American Psychological



Association, (Division 14) Principles Validation and Use of Personnel Selection Procedures: Fifth Edition.

- **Reliable**, demonstrating high consistency in results and freedom from random error.
- **Job Related and Valid**, using job analysis, KSA identification, knowledge source identification, linking sources to KSAs and to tasks, deriving performance and management dimensions, and developing professional quality tests, assessment exercises, and past performance evaluations.
- **Fair**, providing each candidate with a clear perception of equal opportunity to compete on the basis of their relative qualifications for promotional opportunities.
- **Efficient**, being easy to administer and capable of accommodating the number of candidates for the tested ranks.
- **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 a certified list of eligibles for the tested rank.

Our overall goal is to produce an assessment system meeting these criteria. Upon execution of a contract we will immediately hold discussions with Henrico County Police Division' project members and decision-makers to:

- identify staff that will be involved;
- discuss with Henrico County Police Division' decision-makers and project management staff and obtain reactions to proposed methodology; and
- discuss options for making Henrico County Police Division' assessment system one for which all parties will be proud and determine the preferences and options for meeting project timelines.

## **PROPOSED SERVICES - WORK PLAN**

Morris & McDaniel has the ability to successfully develop and administer a promotional process for Henrico County Police Division for the ranks of Sergeant and Lieutenant as well as achieve the Requirements from the RFP and Scope of Work, as stated below:

*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 County's request. The rationale is 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 firm's methodology outside the scope of the proposal review by the proposal decision-makers in Henrico County Police Division.**

Per the RFP, Morris & McDaniel will provide a comprehensive report covering all aspects of each of the four (4) listed Phases.

**The information in this section is proprietary and confidential - Pages 21-46.**

*Phase One: Introduction and Familiarization (May15, 2025)*

- 1. Meet with the Chief of Police, Police Senior Executive Staff and Project Team to discuss the Henrico County Police Division's mission, philosophy and culture and to define goals and expectations for the promotional process.*
- 2. Compose a process announcement letter to potential candidates.*
- 3. Review materials provided by the Division to become familiar with Henrico County Police Division.*
- 4. Develop job task analyses for the ranks of Police Sergeant and Police Lieutenant.*
- 5. Verify job task analyses findings with HCPD subject matter experts.*
- 6. Review and suggest modifications (based on industry best practices) the reading lists for each rank.*
- 7. Publish the Division approved reading list to prospective applicants for promotion with application deadline.*
- 8. Provide a comprehensive report covering all aspects of Phase One.*

## **1. PROJECT PLANNING SESSION (ORIENTATION MEETING)**

Within the first five (5) days following the award of the project, the project team of Morris & McDaniel will discuss the project proposal with the County and Henrico County Police Division' project members and decision-makers. The purpose of these discussions will be to:

- a. become acquainted with the organizational structure and management philosophy of Henrico County Police Division in regard to a new promotional process through discussions and collection of relevant material (e.g., job analyses, 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. confer with Henrico County Police Division project management staff and obtain reactions to the proposed methodology; and
- d. discuss options for meeting selection procedure goals and determine the County's and Department's preferences.

Primary and active involvement in the scope of work will be performed by one or both principals of our firm - specifically Dr. David M. Morris, President, and/or Joe F. Nassar,



Vice-President. Morris & McDaniel can perform the required activities: perform job analyses, develop written multiple-choice examinations, assessment centers, administer and score such components for the ranks of Sergeant and Lieutenant to generate a fair, valid, and defensible eligibility list for the County and Department. As requested by the RFP, Morris & McDaniel will respond to all inquiries via email or telephone in a timely manner. We will communicate on a continuous basis throughout the contract.

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 (County and Department) 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.

*1. Current HCPD Job Review*

*The Successful Offeror shall be provided with existing information concerning the HCPD organization and the target jobs (job descriptions, class specifications, training manuals, Standard Operating Procedures, etc.) and will review provided materials. The Successful Offeror shall gather and review the tasks, duties and responsibilities, knowledge, skills, and abilities for effective and ineffective job behavior and submit for review and accuracy by the HCPS's internal subject matter experts.*

**2. REVIEW EXISTING JOB ANALYSIS DATA AND RELEVANT LITERATURE**

If made available, existing job descriptions, job content questionnaires, and any training materials for the jobs will be carefully reviewed. Sources outside of the organization will also be reviewed, including Morris & McDaniel's extensive library on this position.

*2. Industry Best Practice Analysis*

*The Successful Offeror shall conduct a best practice analysis for promotional processes and assessment centers with the law enforcement industry including, but not limited to, the Virginia Association of Chiefs of Police (VACP), International Association of Chiefs of Police, (IACP), and Commission on Accreditation for Law Enforcement Agencies (CALEA). The results of the Successful Offeror review of provided materials and best practice analysis will be used in the development of the job knowledge process, evaluation dimensions, and assessment center exercises to ensure they reflect the requirements of the target rank. This analysis shall provide the method for content validation.*

**3. CONDUCT A JOB ANALYSIS FOR THE TESTED RANKS**

As requested in the RFP, Morris & McDaniel shall be provided with existing information concerning the HCPD organization and the target jobs (job descriptions, class specifications, training manuals, Standard Operating Procedures, etc.) and will review provided materials. We will gather and glean the tasks, duties and responsibilities, knowledge, skills, and abilities for effective and ineffective job behavior and submit for review and accuracy by the HCPD's internal subject matter experts. In addition, Morris



& McDaniel shall conduct a best practice analysis for promotional processes and assessment centers within the law enforcement industry including, but not limited to, the Virginia Association of Chiefs of Police (VACP), International Association of Chiefs of Police (IACP), and Commission on Accreditation for Law Enforcement Agencies (CALEA). The review of provided materials and best practice analysis will be used in the development of the job knowledge process, evaluation dimensions, and assessment center exercises to ensure they reflect the requirements of the target rank. This analysis shall provide the method for content validation.

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 the assessments 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 create a content validation report 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, Inc. uses a Technical Conference of Subject Matter Experts that has proven to be extremely effective in maximizing the quality of job analytic data for fire, police, sheriff, and corrections officers 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, Inc. team is well-equipped to assist Henrico County Police Division in addressing all critical issues. Certain job analysis procedures and methods are more appropriate for a given assessment system. Further, sufficient biographical information must be gathered for the Subject Matter Experts to document their level of expertise.

The Morris & McDaniel, Inc. 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)



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 municipalities, 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 assessment procedures occurs within a complex context of legal/regulatory and professional requirements. County and Police officials should select a consultant who has a clear understanding of these multi-faceted requirements to establish a legally and professionally defensible assessment process that will be fair and equitable to all candidates.

### ***Job Observations and Interview Sessions with Incumbents***

Experienced job analysts with our firm may conduct one-on-one interviews and job observations (ride-alongs) with Henrico County Police Division job incumbents and/or supervisors of the tested ranks to further understand job duties and responsibilities for the ranks. 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 files on this protective service position, 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 the tested ranks. 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 this committee will be sought.

### ***Develop a Rating Scale to go with the Task Inventory***

Typically, the courts wish to see the following ratings of tasks: (1) relative importance of the tasks, and (2) the necessity-at-entry evaluation. Many jobs require additional ratings such as consequence of error, task delay tolerance, amount of supervision, or the like. These scales will be used and additional rating scales will be used where appropriate. An appropriate biographical checklist will be used. All of this data will be in the instrument and reviewed in the above step. Each scale will be designed to provide relatively unique information about the tasks; i.e., the time spent scale will identify clusters of incumbents performing the job in the same way; the importance scale will be used to verify that the aspects of the job on which test development activities will focus involve those tasks that are relatively important to the job; the necessary at entry scale will tell us what tasks and related KSAs one can use for assessment purposes; and the relationship to successful performance will be used to develop items which will distinguish superior performers from borderline performers.

### ***Develop Sampling Plan***

If a survey process is determined best for the County, 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. KSA linking and rating sessions require four (4) to six (6) hours. Both the task inventory rating and the KSA linking and rating are further discussed in the following sections.*



## Fact Finding Techniques & Job Analysis Costs - Table 2

Most Expensive ----- Least Expensive

No Persons in class	of 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% 50%	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.*



### ***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 this committee will be sought. This procedure lends itself very well to remote procedures and procedures that are fully compliant with CDC recommendations.

### ***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 this committee 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 Report for the Tested Ranks***

We will prepare a Job Analysis Report covering all phases of the activities for the tested rank and maintain the data to be available to the County HRD designees upon request. The Job Analysis Report will comply with relevant professional and government guidelines.

## **4. RECOMMEND PROMOTIONAL PROCESS FOR THE TESTED RANKS**

Upon completion of the job analyses, our firm will conduct work meetings with the appropriate decision-makers within the County Human Resources regarding the appropriate promotional components we would recommend based on the finding of the job analyses.

*Phase Two: Promotional assessment Design and Promotion Applicant Orientation (August 2025)*

1. *Provide a written draft of Sergeant and Lieutenant examination questions based on the criteria agreed upon in Phase One. All questions should be sourced for the agreed upon reading list. There should be enough drafted questions that some may be eliminated in the review process.*
2. *Hold meetings with subject matter experts at the rank of Lieutenant or above to review drafted questions to ensure their validity and relevance to the operations and culture of HCPD. All participants in the review process must sign a confidentiality agreement provided by the vendor.*
3. *Provide a written design draft of Sergeant and Lieutenant assessment exercises based on the criteria agreed upon in Phase One. The draft should include the exercise prompt, the scoring instruments, and information on the validity of all exercise components and description of efforts to avoid adverse impact on any group of applicants in the process. There should be enough drafted exercises that some may be eliminated/updated in the review process.*
4. *Present the plan for assessment center orientation, the plan for assessor selection and training, the logistics and scheduling for all components of the assessments (written examination and assessment exercises), the method for applicant appeal or challenge to any part of the assessment and an updated project timeline.*
5. *Draft a letter to be sent by the Project Team to the applicants with:*
  - a. *An outline and explanation of all components of the assessment;*
  - b. *A schedule/timeline for the assessment; and,*
  - c. *Deliver a recorded (audio and visual) orientation to all applicants to describe the assessment process and components in enough detail for applicants to understand the components of the assessment and how to prepare.*
6. *Provide a comprehensive report covering all aspects of Phase Two.*

## **5. DEVELOP AND DRAFT THE EXAMINATION PLAN**

The data collected to this point will drive this decision. Any cut-off scores used will be in compliance with the Federal Court decisions regarding cut scores. We will work with the County and recommend weights for the examination components. Of course, the analysis of the job data and collaboration with the appropriate Department decision makers will determine the appropriate formats.

*Scope of Services B.3.a. Design a promotion process based on best practice for the ranks of Sergeant and Lieutenant in consultation with HCPD subject matter experts that measures core knowledge, skills, and abilities of each applicable position;*

*Scope of Services B.4.e.3 The Successful Offeror's products shall allow for the possibility of transitioning to a HCPD run assessment center utilizing the Successful Offeror in a consultant role including an assessment center process guide/manual.*

## **6. SUBMIT DRAFT EXAMINATION PLAN TO COUNTY STAFF AND APPROPRIATE DECISION-MAKERS FOR APPROVAL**

Morris & McDaniel will design a promotion process based on best practice for the ranks of Sergeant and Lieutenant in consult with HCPD subject matter experts that measures core knowledge, skills, and abilities of each applicable position. Our firm will allow for the possibility of transitioning to a HCPD run assessment center utilizing our firm in a consultant role including an assessment center process guide/manual. 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. EXAMINATION SCHEDULE**

Morris & McDaniel will work with the Police department and County decision-makers to prepare an assessment schedule for the tested ranks. These schedules are often driven by a number of factors – union contracts, if appropriate, policies, and preferences. Sufficient time must be provided for scheduling Candidate Orientation sessions, Administrator Training, Assessor Training, etc. The final schedule will reflect all of these factors and the Department's preferences.

The Examination Schedule will reflect adequate time to ensure that the test administrators and evaluators are appropriately trained. We follow professional standards in determining the nature of that training.

## **8. DEVELOP READING LIST SOURCES**

A final reading list for the candidates will be presented and our firm will vet this final reading list for adequate availability of sources. Morris & McDaniel will ensure that the final reading list is distributed to candidates an appropriate amount of time prior to the written examination administration date for the ranks of Sergeant and Lieutenant. Depending on the County's required testing schedule, we would typically recommend not less than 90 days prior to the written examination administration date.

## **9. ASSIST WITH WRITTEN TEST ANNOUNCEMENT**

Morris & McDaniel will assist the County with the development of announcements for each rank tested including 1) a reading list 2) the location where the source materials on the reading list will be available, 3) the application procedure and application deadline, and 4) eligibility guidelines for each rank.

*Scope of Services B.3.d. Provide a stude guide minimally 30 days in advance of the process*

*Scope of Services B.4.b. Provide guidance to all candidates of expectations of the assessment process*

*Scope of Services B.4.c. Describe the assessment process and answer candidates' questions*

## **10. DEVELOP AND CONDUCT CANDIDATE ORIENTATION SESSIONS**

Morris & McDaniel is a strong advocate of candidate orientation briefings. Morris & McDaniel will provide a study guide minimally 30 days in advance of the process. In addition to the manual, Morris & McDaniel will provide a video that can be put on the County Intra-net and made available to all the candidates for a specific time. In addition, we will invite all candidates to submit any questions they may have in writing and we will respond to the questions.



We find that these orientation programs “level the playing field” and highly recommend all eligible candidates read the manual and view the orientation session link. 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 48 years of experience in developing and conducting candidate orientation material for written tests and the promotional performance-based assessment programs. We anticipate leaving the link up over several days. At this point it is not known for certain what promotional exercises will be appropriate for each rank. 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). The orientation for the practical exam will be tailored to the practical. 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 links and accompanying manuals 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 Departments' policies and procedures for the promotional process.

The Guidelines and Ethical Considerations for Assessment Center Operations (May 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 County provided facilities. We suggest considering using a link, but will provide the in-person orientation if that is possible and more desirable. Morris & McDaniel can provide the County of a video copy of the orientation presentation for the potential need of administering a make-up examination. After all sessions are complete, a list of Q&As are then posted for all candidates. This ensures all candidates are given the same information. In addition, if a

candidate is unable to attend or view one of the orientation sessions or has additional questions, he/she can set up a date and time with the County to review the orientation video.

*Scope of Services B.3.b. Ensure it can be administered on a computer using Microsoft Windows 10*

*Scope of Services B.3.c. Provide an equivalent version for candidates unable to sit for process due to extenuating circumstances*

*Scope of Services B.4.e.1. Assessment Center Development. Based on information obtained, the Successful Offeror shall develop exercises and evaluation dimensions that reflect the requirements of the target ranks. This provides the method for content validation. Law enforcement agencies face unique problems that lend themselves to the development of exercises. The Successful Offeror will develop exercises that represent these unique situations and provide information as to the abilities of candidates to deal effectively with such challenges. Three exercises will be selected for use in the process. The Successful Offeror may be required to provide equally challenging exercises for members unable to attend due to extenuating circumstances.*

*Phase Three: Written Test and Assessment Exercises (October 2025)*

- 1. Identify and secure the best qualified assessors to bring a wide variety of law enforcement perspectives representing a rank at least one level above the assessed rank. The expectation is for the vendor to pay for all expenses associated with the assessors, such as travel, hotels, meals, etc.*
- 2. Administer training for assessors and invite Project Team and at least one member of the HCPD Senior Executive staff.*
- 3. Prepare and assemble all examination, assessment and scoring forms and instruments; assemble applicant and assessor packets; purchase all materials and supplies; handle all preparation and set-up activities prior to all activities.*
- 4. Secure and set up all audiovisual equipment in order to record each applicant for career development and the appeal/challenge process. All recordings should be provided to HCPD once the process has been completed.*
- 5. Coordinate, monitor and administer all assessment activities for each rank based on the agreed upon design from Phase Two.*
- 6. Complete the breakdown after each assessment activity.*
- 7. Score the written examinations and score or review the scores of the assessors for all assessment activities no later than 30 days after each assessment activity concludes.*
- 8. Provide comprehensive report covering all aspects of Phase Three.*

## **11. DEVELOP WRITTEN TESTS, and ASSESSMENT CENTER EXERCISES**

As requested by the RFP, Morris & McDaniel shall develop exercises and evaluation dimensions that reflect the requirements of the target ranks. This provides the method for content validation. We understand that law enforcement agencies face unique problems that lend themselves to the development of exercises. We will develop exercises that represent these unique situations and provide information as to the abilities of candidates to deal effectively with such challenges. Three exercises will be selected for use in the process. We understand that we may be required to provide equally challenging exercises for members unable to attend due to extenuating circumstances.

### **WRITTEN TESTS FOR TESTED RANKS**

We will provide the County with all details of the written exam administration, candidate and administrator's test instructions, all necessary test copies, supervision, and distribution and collection of all exam materials. 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 48 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. As requested by the RFP, Morris & McDaniel will ensure that it is can administered on a computer using Microsoft Windows 10 and provide an equivalent version for candidates unable to sit for the process due to extenuating circumstances.

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

We recommend that each question have four (4) answer options and will be selected and designed so that a closed book format is appropriate. 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. An item review session will be scheduled with approved Subject Matter Experts (SMEs) within the Department. Approved SMEs will be required to sign a Security Agreement to ensure confidentiality of the content of the items. The final exam for each rank, 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. Sample test items can be found in Appendix F.

Morris & McDaniel recommends an appeal process for item review and challenge by candidates. Our firm has successfully implemented numerous appeals processes and will discuss these options with the County/Department to determine which is best suited for the County. Morris & McDaniel will be available to assist Department SMEs with the decisions on the final outcome of the appeals.

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

### **PERFORMANCE-BASED EXERCISES FOR THE TESTED RANKS**

McDaniel is a leader in developing assessment methods for measuring knowledges and supervisory skills of police 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 or Counseling 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 Supervising Officer.
- An **Structured Oral Interview Exercise** concerning a problem/situation relevant to the organization, 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 Situation Exercise** consisting of one or more scenarios presented to candidates in which candidates are to respond orally, applying fire supervisory knowledge, skills and abilities.

Of course, these are only examples. Actual exercises and exercise content will be chosen based on the job analysis and exercises that have been successfully used in the past for the County, and the specific exercises developed will be tailored to the Department's

specific needs as determined by the job analysis. We would recommend a minimum of two (2) exercises for each tested rank. Sample exercises can be found in Appendix F. As requested by the RFP, Morris & McDaniel will ensure that it is can administered on a computer using Microsoft Windows 10 and provide an equivalent version for candidates unable to sit for the process due to extenuating circumstances.

It is assumed 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 ranks of Sergeant and Lieutenant within the Henrico County Police Division. None of our performance-based tests have had adverse impact on women or minorities.

## **12. REVIEW BY APPROVED SUBJECT MATTER EXPERTS**

In an effort to further ensure content validity of the written exam and the performance-based exercises, Morris & McDaniel recommends an on-site review with approved Subject Matter Experts from within the Henrico County Police Division. In order to ensure that the items are correctly keyed, exercises are appropriate, terminology correct, and are properly tailored to each department and each rank, we recommend all test items and/or exercises be reviewed by competent approved SMEs.

## **13. DEVELOP CAMERA READY COPY FOR REPRODUCTION PURPOSES**

A camera-ready copy of the exercises and tests will be used for duplicating purposes by our firm. Morris & McDaniel will provide all necessary copies of material required for successful administration of the written examination and assessment process.

### *Scope of Services B.3.e. Administer and Score*

## **14. CONDUCT THE ADMINISTRATION OF THE WRITTEN EXAM ADMINISTRATION**

Morris & McDaniel recognizes the importance of a successful 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 and proctors.

The testing location, which to our understanding will be provided by the County, should provide for reasonable comfort for the test-takers with minimal distractions. Instructions to the test takers will clearly indicate how to make responses to the test items. Morris & McDaniel will provide and transport all examination materials to and from the examination facility and requested by the County.

In order to be time-efficient and cost-effective in this component of the process, all candidates will be administered the exam at the same time and at the same location. Our focus on time-efficient and cost-effective measures will in no way deter from our commitment to the clients we serve. We are committed to excellence in service in all

projects and contracts with our clients. We commit to serving our client and candidates with quality customer service.

*Scope of Services B.3.g. Score, compile and analyze the data from test takers within 30 days*

*Scope of Services B.3.h. Develop the process to merge extenuating circumstance scores into original data*

## **15. ANALYZE TEST RESULTS AND CONDUCT ALL APPROPRIATE ANALYSIS FOR ADVERSE IMPACT**

Morris & McDaniel will score the written tests, compile and analyze results, and provide test statistics within 30 days. 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; however, performance-based assessments can be constructed to be free of adverse impact.

As requested, Morris & McDaniel will develop the process to merge extenuating circumstance scores into original data.

*Scope of Services B.3.f. Provide one or more challenge sessions after the process*

## **16. CANDIDATE REVIEW AND APPEAL**

As requested by the RFP, Morris & McDaniel shall develop and lead, with representation from HCPD, an appeal process for those candidates who would like to challenge their assessment score. 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 County 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 team members will be available, or present if requested, during the review/appeal sessions.

Our multiple-choice test review allows candidates to have their individual answer sheet reviewed against the purported key and appeal questions with the source material available. Later, at a designated time, the candidates' appeals will be submitted without

names and any candidate may view the appeal and submit a rebuttal to the appeal. We know of no other system that reflects and protects 14<sup>th</sup> amendment rights of due process and equal treatment better than this appeal system.

### **17. SUBMIT LIST OF CANDIDATES SCREENED FOR THE PERFORMANCE-BASED EXERCISES**

Morris & McDaniel will compute the candidate scores and provide the County with a ranked list of candidates. We will submit to the City a list of those candidates passing the written examination, if a cut off score is used. These candidates will then be eligible for taking performance-based exercises.

### **18. ASSIST WITH PERFORMANCE-BASED ASSESSMENT ANNOUNCEMENT**

Morris & McDaniel will assist the County with the development of an Announcement that may include 1) an outline and explanation of all elements of the promotion process and details about assessment center activities, 2) dates for candidate orientation at times needed to accommodate shifts so all candidates can have the opportunity to attend, and 3) a timeline for the process so candidates can schedule their time and supervisors can provide for staffing.

*Scope of Services B.4.d Provide trained assessors to observe each candidate's performance and evaluate candidates' behavior on predefined dimensions that relate to success on the job*

### **19. ASSESSOR SELECTION AND TRAINING**

As requested by the RFP, Morris & McDaniel shall systematically evaluate candidates based on benchmarks tied to a series of behavioral dimensions that capture the leadership competencies necessary to successfully act as a police leader. Desired dimensions include, but are not limited to, oral and written communication, problem solving, judgment, decisiveness, planning/organization, and delegation/control.

Morris & McDaniel will provide trained assessors to observe each candidate's performance and evaluate candidates' behavior on predefined dimensions that relate to success on the job. Morris & McDaniel recognizes the importance of a well-trained cadre of assessors to ensure the successful operation of public safety performance-based assessment programs. Morris & McDaniel shall identify and coordinate the selection of assessors for each promotional process. We will work in consultation with HCPD will develop qualifying/disqualify criteria, recommended characteristics, and qualification for assessors chosen to score, rate or rank candidates during the selection process. We will train each assessor and develop any materials needed to train. The core of this training will be practice and feedback, using the actual exercises to be used and the associated assessor report forms.

As requested by the RFP, the assessor shall review the data collected on a candidate to assign a numerical score on the job-related dimensions measured by the assessment center exercises. The scores shall be made independently and without discussion with

other assessors. The numerical scores shall be recorded, and ratings supported by specific examples of behavior observed in each exercise.

Dr. Morris, Judge McMillin or Mr. Nassar and one or more staff members from our firm will be on-site to conduct the assessor training and to monitor the entire scoring activity process. The training and scoring of the practical exam will be tailored to the exercises, and be very observational /behavior based.

For the Assessment Center exercises, Morris & McDaniel gives deference to the procedures outlined for assessor training in the Guidelines and Ethical Considerations for Assessment Center Operations.

Morris & McDaniel, Inc. recommends a diverse group of assessors, equal to the tested rank or higher and including ethnic, racial, and gender diversity, be recruited and trained to rate and assess the tested rank. We will conduct a training session for the assessors immediately prior to the assessment scoring activities.

A sample table of contents for assessor training is given 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 the training and scoring activities, each assessor will receive a written reference manual (assessor 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 exercises 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 final eligibility list may be based on the assessment process and the score on the written test. The scores are typically converted to a 100-point scale.

During the training session, 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 Henrico County Police Division assessment program.

For each exercise, a minimum of one (1) team of three (3) assessors of the four (4) on the assessor panel will score each candidate testing for a specific rank. No one (1) assessor will be responsible for solely observing or evaluating candidates on any exercise. Morris & McDaniel staff has 48 years of experience assisting in and recruiting assessors from departments across the United States and planning and scheduling the recommended number of assessors for the number of candidates testing.

#### *Scope of Services B.3.e. Administer and Score*

*Scope of Services B.4.a. Develop and conduct an assessment center for the ranks of Sergeant, Lieutenant and Captain that allows candidates to participate in a series of individual exercises that simulate critical aspects of the target ranks*

## **20. ADMINISTRATION OF THE PERFORMANCE-BASED EXERCISES**

As requested by the RFP, Morris & McDaniel will develop and conduct an assessment center for the ranks of Sergeant and Lieutenant that allows candidates to participate in a series of individual exercises that simulate critical aspects of the target ranks. Candidates will participate in exercises during an intensive period of assessment. All activities will be scheduled in advance, and Morris & McDaniel will administrator and monitor all procedures. Dr. Morris, Judge McMillin and/or Mr. Nassar, firm officers and other staff, will be on-site for supervising the administration of the assessment exercises. We will provide all materials needed for the administration of the exercises, including candidate instructions and materials, exercise administration and rating materials, and any additional materials or resources deemed appropriate.

The procedures and logistics for administering the assessment center live to the candidates to maintain security is to include scheduling candidates and evaluators for the assessment center administration. Our firm is very experienced in providing these services, with a combined ninety-five (95) years of experience in doing so. Our firm can

work with the County on mutually agreeable dates for the assessment administration for the tested ranks.

## **21. MONITORING THE ASSESSMENT SCORING PROCEDURES**

Dr. Morris and Mr. Nassar and/or one or more senior consultants will monitor the assessors' scoring activities during the performance-based exercises.

### *Phase Four: Scoring. Applicant Feedback and Process Review (December 2025)*

- 1. Compile and present the results (scores) of all assessment activities to the Chief of Police or his designee.*
- 2. Compile a written report for each applicant and debrief each applicant on his/her performance. Ratings for each activity and a summary total for the individual applicant must be included in the report, as well as the top score, bottom score and average score with no names attached. A summary of the assessor's comments and a brief assessment of strengths and weaknesses must be included.*
- 3. Provide a comprehensive final report.*
- 4. Provide a copy of all materials necessary to support review and administration of all testing assessments, scoring and feedback for each assessment activity.*
- 5. Review the entire project with the Chief of Police, the Project Team to share feedback and evaluate the assessment process.*
- 6. Provide the Division with timely assistance to address any post-promotion appeals, grievances of other litigation arising out of the performance of this promotional process.*

## **22. CANDIDATE FEEDBACK**

As requested by the RFP, data concerning candidates shall be combined. This integration may be accomplished with an assessor consensus meeting or by statistical combination of data. In either case, the final rating on each performance dimension shall be based on multiple raters evaluating performance in different situations. The result should be a comprehensive picture of each candidate's capabilities and a quantitative evaluation on job-related dimensions.

Morris & McDaniel proposes to provide each candidate with individual written feedback, to include individual score summaries for each candidate comparing candidate test performance across each test component and in the entire test process to the average performance of the test-taker group across the same categories. Written feedback will consist of providing each candidate with the overall score and with a skills profile. This will indicate the areas in which he/she excelled, and the areas where there are developmental needs.

It has been Morris & McDaniel's experience that acceptance of the assessment process is enhanced by providing candidates with feedback on their performance in the assessment programs.

## **23. PRESENTATION OF RESULTS**

Morris & McDaniel, Inc will provide the County a rank ordered promotional list of each assessed police rank. We shall present candidate score reporting and feedback, based upon our earlier discussions of County preferences, and obtain approval from County personnel. Our firm is capable of providing the promotional lists in various MS Excel formats and the rank-ordered lists will include candidate names, the score for each test component, overall scores, any weighted scores, and any other information the County desires.

## **24. SUBMISSION OF FINAL VALIDATION (TECHNICAL) REPORT**

Morris & McDaniel will provide the County a final validation report for each rank for which a selection process is developed and administered. Morris & McDaniel will compile and maintain all necessary information to draft a final validation report which encompasses the processes, steps preparation, job relatedness, data collection, administration, and scoring of the promotional process for the ranks tested. The Final Report will be developed following appropriate professional and legal requirements and guidelines. The reports will include the results of the project methodology, the job analyses, the procedures used in the development, administration and scoring of the selection devices, and process by which the scores were weighted and validated and any other relevant test data.

### ***Maintain Validity Evidence for Judicial Review***

Our firm is fully aware of its responsibility in maintaining and documenting all procedures and to do so in such a way as to comply with the expectations of judicial review. Our reports are designed to defer to the documentation requirements of the Uniform Guidelines and appropriate professional guidelines. Morris & McDaniel will retain all records, test results, score sheets, rater records, correspondence emails and other documents received and generated relating to the services provided.

### ***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 or Remark 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, or CD ROM. This allows for a wide range of input options. Output may be requested by laser-printed form, USB flash drive, or on CD ROM.

Morris & McDaniel also uses advanced technology to facilitate productive project management. We have the ability to provide online study guides and online test administration. We have access to Cisco WebEx, Microsoft Teams, and Zoom 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.

### ***Unexpected Issues and/or Changes***

Morris & McDaniel is prepared to respond promptly to unexpected issues, potential problems, or any changes in the scope of work.

### ***Security of Materials***

Morris & McDaniel will maintain the necessary security procedures in the development, reproduction, assembly, delivery, and administration to insure the integrity of the promotional processes. Morris & McDaniel has effectively maintained the security of the assessment materials in all of our projects involving assessment programs for the past 48 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 Department SMEs in the review of written test and/or assessment center exercises will be based on Department approval. All approved SMEs will be required to sign Security/Confidentiality Agreements as part of their participation and will be only utilized on the day of exam administration in a sequestered location.

### ***County/Department Involvement***

Morris & McDaniel will need the assistance and advice of appropriate knowledgeable officials within the Henrico County Police Division to consult and advise on test content and content of oral exercise construction on the day of the exam administration to ensure the testing process measures with as much fidelity as possible the requisite characteristics essential to performance in the targeted position.

The County will be responsible for venue selection for the various administration events and Morris & McDaniel will ensure maximum suitability of all activity locations. Morris & McDaniel will advise the County HRD of any requirements of the testing facilities; such as, number of rooms at school for assessment procedures, number of County helpers/proctors needed, number/size of tables for written examinations, etc. This information varies based on the number of candidates being tested and number of exercises being administered. Morris & McDaniel would expect senior officials to be in attendance or on call for all

candidate-related activities to be able to speak with authority on behalf of the Department when unanticipated issues arise, and to enforce discipline among candidates as required.

***A Delineation of the Consultant's and the County's/Police department's Responsibilities/Deliverables***

It is our understanding that the County/Police department will be responsible for the following:

- Providing facilities or Intranet link capability necessary for all candidate orientation session, written examination administration and assessment center administration.
- Reasonable access to approved people and/or Subject Matter Experts (SMEs) in the Department for job analyses and day-of review of examination components
- Providing Consultant with the most current job task analyses, and most current general orders, performance standards and other material to assist in the development of a valid, job related assessment process.

It is our understanding that Morris & McDaniel will be responsible for the following:

- Conducting thorough job analyses and working with the County to ensure proper linkage for the targeted ranks.
- Presenting job analyses finding and recommending appropriate validation strategies to the County HRD designees.
- Proposing and implementing procedures designed to minimize adverse impact.
- Advising the County on the weighting of assessment components for the tested ranks.
- Assisting County HRD in preparing information bulletins/correspondence to candidates announcing the various testing phases.
- Developing, duplicating, and administering valid and defensible assessment components for each rank.
- Determining source materials for candidates to study and prepare for the exams and confirming that the source materials are readily available.
- Meet, as appropriate, with the appropriate decision-makers to give updates on project progress.
- Developing and conducting candidate orientation session and providing individual handouts to all eligible candidates. Providing audiovisual recording of orientation for playback.
- Working with County HRD to administer the examinations including Proposer's assigned project manager and designated staff on-site during test administration of written and assessment center tests. Providing training to County HRD staff and/or proctors at least one day prior to the administration of a test component.
- Determining scoring methodologies to be used and scoring test components for each rank. Training assessors used in the test administration and/or scoring. Scheduling, coordinating, and handling billing for all assessor activities, travel, food and lodging.
- Providing a formal test review and appeals process to candidates. Developing procedures to provide written feedback to candidates regarding

their test scores and performance.

- Being on-site throughout the assessor training and monitor assessor scoring.
- Adhering to schedules mutually developed by Morris & McDaniel and County/Department decision makers.
- Keeping the County informed of progress, design, and administrative developments.
- Presenting written validation reports for each rank tested that documents the projects in detail.
- Retaining all records and test results for five (5) years following completion of validation reports pending no litigation. The validation reports will be maintained by proposer and will be made available to County HRD upon request. Retaining all test material relating to this project.
- Using best technology methods in all phases of testing process.
- Recommending the most time-efficient and cost-effective test administration methods which take into account a quality customer service experience for candidates.
- Submitting invoices and supporting receipts in a timely manner and adhering to County travel policy.
- Providing County with rank-ordered list of eligibles for the tested ranks upon conclusion of test scoring process.
- Providing candidates with individual written candidate feedback.

*4. Provide an outline of all the steps and a timeline for completion to meet the required project deadline;*

**Time Schedule**

Morris & McDaniel acknowledges and confirms that we can accommodate the Anticipated Project Timeline as provided in the RFP. The Gantt chart on the following page represents a sample timeline of events for the ranks of Sergeant and Lieutenant.

Issue Date:	February 18, 2025
Receive Proposals	March 18, 2025
Contract Signed	April 15, 2025
Phase One vendor work period completed	May 15, 2025
Phase Two vendor work period completed	August 15, 2025
Written Test	1 <sup>st</sup> week of October 2025
Assessment Exercises	3 <sup>rd</sup> or 4 <sup>th</sup> week of October 2025
Phase Three vendor work period completed	October 31, 2025
Phase Four vendor work period completed	December 31, 2025

**TIMELINE OF TASKS FOR PROMOTIONAL PROCESSES  
GANTT CHART  
BASED ON 16 WEEK DURATION**

<b>TASKS</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>
Contract Execution																
Project Planning																
Review Existing Job Analysis & Conduct Job Analysis to Demonstrate Validity																
Recommendation of Source Material for Written Exam and Exam Plan and Announcement																
Develop and Conduct Candidate Orientation Sessions																
Development of Written Examination, Performance-based Exercises; SME Review/Input																
Written Exam Administration and Scoring																
Candidate Appeal Process																
Assessor Training and Monitor Scoring																
Administer Performance-Based Exercises Component																
Submit Candidate Feedback Reports																
Presentation of Results (Eligibility List)																
Final Report																
Project Completion																

**Our information claimed as proprietary and confidential ends here.**

## **TAB 6: EXPERIENCE, QUALIFICATIONS, REFERENCES AND FINANCIAL CAPACITY**

*In this tab, Offerors should demonstrate the Offeror's, and their staff's qualifications, and experience in providing the services as requested in this RFP. Offerors should provide, at a minimum, documentation demonstrating that they are regularly engaged in providing the services solicited in this RFP for no less than four (4) years. If subconsultants are to be utilized, provide similar documentation to what has been requested of the Offeror in this section. Offerors shall also provide:*

- a. A company profile that shows the ability, capacity and skill of the Offeror, their staff, and their employees to perform the services required within the specified time;*
- b. Number of years in business;*
- c. Documentation indicating the Offeror's financial capacity;*
- d. Resumes of key staff assigned to the project, including the amount of experience the individual has had relative to the Scope of Service set forth in the solicitation;*
- e. Documentation describing the professional qualifications of the representative of the Offeror who will oversee the Henrico County account; and,*
- f. References of current and past clients for which the offeror has provided services similar to those specified in the Scope of Services, to include current up to date contact information.*

## ***Description of Our Firm***

Morris & McDaniel, Inc. 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 company has offices in the following cities:

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

Our Washington, D.C. office will be the principal office servicing Henrico County Police Division project. 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 police fields. We are well experienced in developing practical exercises/exams for all ranks in the police services.



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.

## **COMPANY PROFILE**

### ***Professional Qualifications of Morris & McDaniel, Inc.***

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.

Our work with the Mississippi Highway Patrol involving their entry-level selection procedures resulted in exceeding the parity goals established by the litigants during the twelve separate administrations (2005, 2006, 2007, 2011, 2014, 2017, 2018, 2019, 2020, 2021, 2022, and 2023). Please see Appendix D for a ruling by U.S. District Judge Walter

Gex of United States District Court for the Southern District of Mississippi Southern Division (see A.6., page 3, and B.11., page 4 of Judge Gex’s ruling) which allowed the Mississippi Highway Patrol to proceed with its entry-level testing and selection. Judge Gex further stated that “The selection process developed by Morris & Associates (a division of Morris & McDaniel, Inc.) will be used to select candidates for subsequent cadet classes of the Mississippi Department of Public Safety.” The successful testing conducted by Morris & McDaniel ended the long, protracted litigation which dated back to 1970.

We have been asked to help large public service departments with their promotional procedures with appropriate diversity as a goal. 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”, we were successful in achieving “the most diverse candidate pool in the history of the Rochester Fire Department.”

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

Since 2002, the City of Memphis, Tennessee, Testing and Recruitment Division, has used our firm for their Fire promotional testing (e.g., Fire Suppression ranks of Battalion Chief, Division Chief, Lieutenant, Fire Driver and Air Rescue Chief; Fire Prevention Ranks of Fire Inspector, Fire Inspection Supervisor, Fire Investigations and Assistant Fire Marshal; Fire Communications Ranks of Senior Fire Alarm Operator and Watch Commander; and EMS Ranks of Battalion Chief, Division Chief, and Lieutenant). After we tested 1,000 candidates for over three promotional ranks, Director Chester Anderson, the former Chief of the Fire Service, said that it was the first time in 30 years that there was no litigation and that we had achieved excellent diversity in the final lists. Morris & McDaniel, Inc. has continued to demonstrate excellence to our clients in the successful development and administration of entry-level and promotional public safety projects.

Morris & McDaniel, Inc. was the “go to” firm for both the Philadelphia Police Department and the Mississippi Highway Patrol, two jurisdictions that have had diversity issues and long protracted litigation. Our assistance in both 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. is 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).

### ***Written Multiple Choice Exams***

Morris & McDaniel has conducted thousands of promotional written exams for Police Service ranks similar to the ranks being tested in the Henrico County Police Division. Examples of projects involving the design and administration of written exams include Austin Police Department, New Haven Police Department, Norfolk Police Departments to

name a few. The development of our written job knowledge tests 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). The promotional process for Henrico County Police Division will be developed and conducted in such a manner as to conform to both professional standards and governmental guidelines. We use only trained, licensed psychometrists to write our test items, and we recommend all test items be reviewed by competent approved SMEs. We have used combinations of traditional multiple-choice questions that assess knowledge, and scenario-based questions that assess both application of knowledge as well as management and supervisory skills and abilities.

### ***Assessment Centers and Practical Exams***

Morris & McDaniel, Inc. officers have considerable experience in the design and implementation of state-of-the-art assessment centers and practical exams for supervisory and managerial positions. 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. Members of our staff have delivered keynote addresses at the International Congress on the Assessment Center Method and numerous other professional organizations

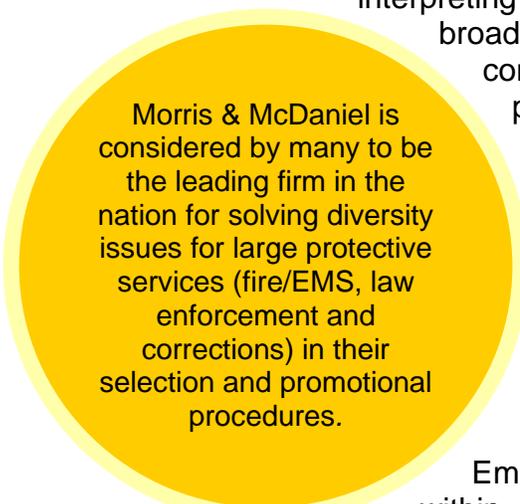
### ***Job Analysis***

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 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 recommends a technical conference job analysis method which puts the burden of labor on us the consultant to organize the tasks and KSAs so that they can be thoughtfully reviewed by a panel of SMEs and rated. This procedure was estimated by one jurisdiction to save the City over \$30,000 per rank. Even though the survey procedure for job analysis has some value, due to the litigation that more frequently occurs with Public Safety promotions, is a stronger process where a thoughtful decision is rendered by SMEs for each task and KSA. This process will be described in more detail below.

### ***Legal, Regulatory, and Professional Issues***

Morris & McDaniel 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 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.



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.

Employee selection and promotions in government occur within the context of legal/regulatory, social, professional, and political pressures. Legal pressures are typically two-fold: merit system statutes mandating the selection/promotion of the best qualified candidates and attention to civil rights legislation, encouraging employers to have a workforce that is sensitive to the representation of the various racial, gender, and ethnic groups.

Merit systems for government usually have, as the goal, a rank-ordered list of candidates. This practice requires the establishment of a list based upon the most valid battery available. It is likely that such a management practice, applied to a list based upon a job-related job analysis and promotion process, leads to employee perceptions of a fair and equitable promotion process.

There is a legal requirement for job analysis and the development of job-related and valid promotional procedures for any jobs covered by a merit system when those State and municipal merit systems impact members of a particular racial, gender, or ethnic group (i.e., by the presence of a substantially different rate of selection, promotion, etc.). The guidelines apply to the full range of assessment techniques including minimum qualifications, ratings of training and experience, written tests, oral boards, and assessment centers.

When adverse impact has been demonstrated for a promotion procedure, the employer has several options, including the presentation of validity evidence to rebut the *prima facie* case of discrimination based on the adverse impact statistics. A large part of this evidence deals with the job analysis methodology and the documentation of content validity. The Uniform Guidelines provide extensive guidance as to the necessary documentation for this type of evidence of job-relatedness (these requirements are summarized in the section on Job Analysis).

Morris & McDaniel officers have been recognized as experts in interpreting these Guidelines in Court. We have also developed and instructed seminars on the Uniform

Guidelines explaining the technical provisions to personnel directors in the public and private sectors. The principals of Morris & McDaniel have also had extensive experience in Title VII litigation, assisting in case preparation and the presentation of expert testimony.

### ***Examination Experience***

Our approach in test development is collaborative. Based on the job analysis results, we make a recommendation of the types of assessments that are typically used to assess particular competencies and performance dimensions. We meet with officials of the County to review our proposed exam plan. We help the County officials to evaluate their various options in light of time scheduling constraints, number of candidates to be assessed, test security issues, and budgetary constraints. We 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 assessors/raters. For practical exams, we will discuss what has worked best for the County in the past and use that as our starting point.

The development of a written job knowledge 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). For performance-based exercises, such as oral presentation exercises and table top exercise simulations, we follow the Guidelines and Ethical Considerations for Assessment Center Operations endorsed by the 28th International Congress on Assessment Center Methods (May 2015). The promotional process for the Department will be developed and conducted in such a manner as to conform to both professional standards and governmental guidelines.

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, prior work history with the jurisdiction, and ranks tested.

***Note: Morris & McDaniel, Inc. does not wish to disclose our firm’s protective service clients outside the scope of the proposal review by the proposal decision-makers in Henrico County Police Division.***

***The information in this section is proprietary and confidential - Pages 52-58.***

### **CLIENT REFERENCES AND PROFESSIONAL EXPERIENCE IN PROVIDING SIMILAR CONSULTING SERVICES**

Morris & McDaniel, Inc. has over forty-eight (48) 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.

### **HOUSTON POLICE DEPARTMENT, HOUSTON, TEXAS**

**Contact:** Executive Director HPOU Ray Hunt, 832-200-3417, [ray.hunt@hpou.org](mailto:ray.hunt@hpou.org)

#### **Services provided from 2012 - Present**

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

#### **Services provided from 2021 - Present**

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

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

### **NEWPORT NEWS POLICE DEPARTMENT, NEWPORT NEWS, VIRGINIA**

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

[bradleysb@nnva.gov](mailto:bradleysb@nnva.gov)

#### **Services provided from 2009 – Present:**

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

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

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

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

**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 (Virtual & In Person).

### **DURHAM POLICE DEPARTMENT, DURHAM, NORTH CAROLINA**

**Contact:** Deputy Police Chief Shari Montgomery, cell 919- 314-7150

[shari.montgomery@durhamnc.gov](mailto:shari.montgomery@durhamnc.gov)

#### **Services provided from 2001 – Present:**

**Police Lieutenant** - conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises and conducted professional history reviews.

**Police Sergeant** - conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises and conducted professional history reviews.

**Police Corporal** – conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises and conducted professional history reviews.

**Entry-Level Police Officer** – conducted a police officer selection process, developed and administered an entry-level law enforcement examination, CPS, and structured oral process (Virtual & In Person).

**PRINCE WILLIAM COUNTY POLICE DEPARTMENT, PRINCE WILLIAM COUNTY, VIRGINIA**

**Contact:** Assistant Chief Kevin Hughart, 571-238-2673, khughart@pwcgov.org

**Services provided from 2013 – Present:**

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

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

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

**DURHAM POLICE DEPARTMENT, DURHAM, NORTH CAROLINA**

**Contact:** Deputy Police Chief Shari Montgomery, cell 919- 314-7150  
[shari.montgomery@durhamnc.gov](mailto:shari.montgomery@durhamnc.gov)

**Services provided from 2001 – Present:**

**Police Lieutenant** - conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises and conducted professional history reviews.

**Police Sergeant** - conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises and conducted professional history reviews.

**Police Corporal** – conducted job analyses. Developed and administered written knowledge examinations, performance-based assessment exercises and conducted professional history reviews.

**Entry-Level Police Officer** – conducted a police officer selection process, developed and administered an entry-level law enforcement examination, CPS, and structured oral process (Virtual & In Person).

**FORT WALTON BEACH POLICE DEPARTMENT, FORT WALTON BEACH, FLORIDA**

**Contact:** Tarey Franxman, Human Resources Director, 850-833-9506  
[tfranxman@fwb.org](mailto:tfranxman@fwb.org)

**Services provided from 2017 – Present:**

**Corporal** - conducted job analyses. Developed and administered knowledge examinations and performance-based assessment exercises.

**Sergeant** - conducted job analyses. Developed and administered knowledge examinations and performance-based assessment exercises.

**Lieutenant** – conducted job analyses. Developed and administered knowledge examinations and performance-based assessment exercises.

#### **DALLAS POLICE DEPARTMENT, DALLAS, TEXAS**

**Contact:** Catrina M. Shead , Assistant Chief of Police, Office: 214-671-3906, Cell: 214-907-4919 [catrina.shead@dpd.ci.dallas.tx.us](mailto:catrina.shead@dpd.ci.dallas.tx.us)

##### **Services Provided from 2021-Present:**

**Senior Corporal** – Conducted job analysis. Developed written known examination.

**Sergeant** - Conducted job analyses. Developed written knowledge examinations. Developed and Administered performance-based assessment exercises.

**Lieutenant** – Conducted job analyses. Developed written knowledge examinations. Developed and Administered performance-based assessment exercises.

#### **LOWELL POLICE DEPARTMENT, LOWELL, MASSACHUSETTS**

**Contact:** *Mary McCallery, Human Resources Director, City of Lowell, 978-674-1031, [McCallery@lowellma.gov](mailto:McCallery@lowellma.gov)*

##### **Services Provided from 2022 - Present:**

**Police Captain** - conducted job analyses. Developed and administered performance-based assessment exercises.

**Police Lieutenant** - conducted job analyses. Developed and administered performance-based assessment exercises.

**Police Sergeant** – conducted job analyses. Developed and administered performance-based assessment exercises.

#### **WATERBURY POLICE DEPARTMENT, WATERBURY, CONNECTICUT**

236 Grand Street, 4th floor - Waterbury, CT 06702

**Contact:** **Contact:** *Cherrie Lamb, HR/Civil Service, 203-574-6761, [clamb@waterburyct.org](mailto:clamb@waterburyct.org)*

##### **Services Provided from 2021 - Present:**

**Police Sergeant** - Conducted job analyses, written knowledge examinations, and performance-based assessment exercises.

**Police Lieutenant** - Conducted job analyses, written knowledge examinations, and performance-based assessment exercises.

**Police Captain** - Conducted job analyses, written knowledge examinations, and performance-based assessment exercises.

**Police Deputy Chief** - Conducted job analyses, written knowledge examinations, and performance-based assessment exercises.

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

#### **HARTFORD POLICE DEPARTMENT, HARTFORD CONNECTICUT**

**Contact:** Marlene Fleeting, Interim Human Resources Director, 860 757 9814, fleem001@hartford.gov

**Services Provided from 2019 to Present:**

**Police Sergeant** - Conducted job analyses, written knowledge examinations, and performance-based assessment exercises.

**Police Lieutenant** - Conducted job analyses, written knowledge examinations, and performance-based assessment exercises.

**Police Captain** - Conducted job analyses, written knowledge examinations, and performance-based assessment exercises.

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

**RICHMOND POLICE DEPARTMENT, RICHMOND, VIRGINIA**

**Contact:** Antoinette H. Tull, Former Human Resources Director, PHR, SHRM-CP, HRPM; 804- 640-0323 [antionette@hurtlellc.com](mailto:antionette@hurtlellc.com)

**Services provided from 2011 – Present:**

**Police Captain** - conducted job analyses. developed and administered written knowledge examinations, and performance-based assessment exercises.

**Police Lieutenant** - conducted job analyses. developed and administered written knowledge examinations, and performance-based assessment exercises.

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

**ADDITIONAL PUBLIC CLIENTS**

ABAC Department of Public Safety  
ACC, Bhutan  
Alpharetta Police Department  
Americus Police Department  
Amtrak Police Department  
Andry Law Firm  
Arkema, Inc.  
Atlanta Fire Department  
Auburn Behavioral Medical Interventions  
Brevard Fire Department  
Cedar Park Police Department  
Chattanooga Fire Department  
Chesapeake Fire and Police Departments  
City of Akron  
City of Ann Arbor  
City of Austin  
City of Laurel  
City of Clarksdale  
Clayton County Corrections  
College Park Fire Department  
College Park Police Department  
Colorado Springs Police Department

Courts of Georgia  
DC Fire Department  
De Pere Fire Rescue  
Doraville Police Department  
Equistar Chemicals  
Florida Dept of Corrections  
Florida Panhandle Technical College  
Flowery Branch Police Department  
Floyd County Human Resources Department  
Forsyth County Fire Department  
Fort Lauderdale Police Department  
Fort Myers Fire Department  
Fort Walton Beach Police Department  
Fort Worth Police Department  
GACP  
Gorman & Williams  
Greenville Police Department  
Hanover Fire Department  
Hartford Fire Department  
Houston Fire Department  
Irving Fire and Police  
Jackson Fire Department  
Jackson Municipal Airport  
Jackson Police Department  
Jacksonville Aviation Authority  
Jefferson Parish Sheriff's Office  
Kansas City Fire Department  
Lyondell  
M C Dean  
M.D. Anderson Cancer Center Police Department  
Maryland Park Police  
Mississippi Department of Corrections  
Memphis Fire and Police Department  
MS Department of Public Safety  
New Haven Fire and Police Department  
New York Police Department  
New York Fire Department  
Newport News Fire and Police Department  
Norfolk Police Department  
Orange County Fire-Rescue  
Orange County Sheriff Office  
Orleans Parish Sheriff's Office  
Oxnard Fire Department  
Palm Beach County Fire Rescue  
Consolidated Nuclear Security/National Security Complex  
Portsmouth Fire and Police Departments  
Prince William County Police Department

Richmond Hill Police Department  
Rochester Police Department  
Shelby County Fire and Sheriff's Office  
Stamford Police and Fire Department.  
Syngenta  
University of Connecticut Fire Department.  
Uganda Police Force

**Our information claimed as proprietary and confidential ends here.**

### ***Grievances/Complaints/Litigation***

#### ***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 our firm will assist the County in addressing the candidates' appeals.

Individual written feedback, indicating final raw and converted scores, will be provided to all candidates. Each written test question will be organized by reference source and page citation allowing for a more structured appeal/challenge process and feedback to the candidates.

For the Assessment Center exercises, Morris & McDaniel distinguishes itself from other vendors by being the only one able to offer a patent pending 2<sup>nd</sup> review process. This process is available and an option at no additional costs and makes it possible for a candidate to request a second review for her or his assessment center performance by exercises

### ***Insurance***

Morris & McDaniel, Inc. holds the required insurance coverage. Upon award of the contract, Morris & McDaniel, Inc. will agree to present certified proof of coverage to Henrico County Police Division and provide a Certificate of Insurance naming the County as an Additional Insured.

### ***Indemnification***

Morris & McDaniel, Inc., shall indemnify and save harmless forever the Henrico County, Henrico County Police Department, and all Henrico County agents, officers and employees, appointees, managers, heirs, officers and assigns, etc. from and against all charges, claims, or suits resulting from any bodily injury, loss of life, or damage to property arising or claimed to have arisen from any act or omission of Morris & McDaniel, Inc., its agents and employees, undertaken in the performance of this contract. The aforesaid indemnification provision does not create a duty on the part of Morris & McDaniel, Inc. to defend at its own cost suits or claims brought against the Henrico County, Virginia or Henrico County Police Department by dissatisfied applicants for hiring or promotion

alleging bias, discrimination or any other legally-cognizable defect in the methods or procedures devised by Morris & McDaniel, Inc. under this agreement for use by the Henrico County or Henrico County Police Department to make hiring and promotion decisions.

Notwithstanding the foregoing, Contractor has no duty to provide a defense at Contractor's sole cost against unproven claims asserted by candidates for promotion or by other entities alleging injury attributable to some actionable defect in the testing and assessment processes provided by Contractor under this contract. Contractor's separate obligation to indemnify and hold harmless remains intact as to such claims attributable to Contractor's performance and, once such claim is proven, the duty to indemnify shall specifically include a duty to reimburse the City for the cost of defending.

### ***Statement of Financial Condition***

Morris & McDaniel has over 48 years' experience in this field and routinely handles projects of all sizes up to several thousand candidates. We have never, in our 48 years, encountered any difficulty in meeting the financial requirements of conducting such projects. We enjoy an excellent credit rating among our suppliers and with our bankers. We can readily furnish references from multiple financial institutions if desired. We also have an excellent Dun and Bradstreet credit rating, which we invite the County to review. We have provided documentation indicating financial capacity in Appendix E.

### **EMPLOYMENT DISCRIMINATION LAW**

Morris & McDaniel 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 has also conducted several projects to develop and validate new selection procedures that comply with legal requirements and consent decrees.

Morris & McDaniel is considered by many to be the leading firm in the nation for preventing costly lawsuits and solving diversity issues for large protective service organizations (law enforcement, corrections, and fire/EMS) in their selection and promotional procedures. We were the "go to" firm for the Philadelphia Police Department and the Mississippi Highway Patrol, two jurisdictions that have had diversity issues and long protracted litigation. Our assistance in all 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.

## **STAFF QUALIFICATIONS**

### ***Project Manager and Staffing Plan***

Morris & McDaniel has an outstanding professional project team to support Henrico County Police Division. The team, and the role of each member of the team, is presented in the Organizational Chart and narrative description of this chart on the following pages. Complete resumes for each team member can be found in Appendix C.

### ***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 heavily involved in all project activities. Between them, they represent ninety-five (95) 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 Wilson, and Steven Watkins. Our project staff is highly experienced in job analysis procedures, written test, assessment center exercise, and behavioral-based interview development, as well as with using statistical computer programs to produce the statistical analyses and technical reports required by this project.

Morris and McDaniel has over forty-eight (48) years of professional experience in providing the kind of services you have outlined in your RFP. The two principals, Dr. Morris and Mr. Nassar, have worked together for forty-seven (47) of the forty-eight (48) years our firm has been in business. Our professional staff possesses the education and professional experience, and corporate financial capabilities to successfully complete your requested testing services. We have provided documentation indicating financial capacity in Appendix E.

Upon execution of a contract, members of our project team will immediately hold discussions with the Department's project members and decision-makers to:

- become better acquainted with the organization structure and management philosophy of the County with regard to a new promotional process through discussions and collection of relevant material regarding the tested ranks;
- identify staff that will be involved;
- discuss with the County/department HRD's decision-makers and project management staff and obtain reactions to proposed methodology; and

- discuss options for making County’s promotional system one for which all parties will be proud and determine the preferences and options for meeting project timelines.

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.

**Project Organization Chart**



**Morris & McDaniel Team of Staff Members**

Morris & McDaniel staff members will work as a team to complete the tasks required by Henrico County Police Division. The personnel presented in the following paragraph have successfully worked together as a team in similar roles as those listed below to complete projects with similar scopes of work for various police departments, including but not limited to Norfolk Police Department, Newport News Police Department, Shelby County Sheriff’s Office, and Durham Police Department.

Dr. David Morris, President and licensed I/O Psychologist, will serve as Project Director of this team and will be responsible for the following: 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 Nassar, Vice President, will serve as Project Coordinator and will have several responsibilities including: ensuring that project elements are performed in a timely manner and coordinated with the appropriate County parties; assisting with job analyses; written test and performance-based assessment development and administration; assessor recruitment, assessor liaison, assessor training; and monitoring scoring activities. Judge Roger McMillin, President of Operations, will be head of contractual and legal issues. He will also be involved in performance-based assessment administration; monitoring scoring activities; written test and performance-based assessment development and administration; assessor training; and monitoring scoring activities. Dr. Lana Whitlow (Psychologist) and Judith Thompson (licensed psychometrist), Senior Research Consultants, will be responsible for assisting with the quality of test instruments and any reports generated. Antoinette Tull (PHR HRPM), Dr. Jeff Rain (I/O Psychologist) and Dr. Mark Mincy (Psychologist), Senior Research Consultants, will be responsible for the following tasks: assisting 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; review of written tests and performance-based exercises; and conducting all statistical analyses. Kim Anderson, Senior Research Consultant, will conduct and oversee Data collection for the Job Analysis; develop announcements; develop and finalize written tests; develop performance-based exercises; conduct reviews with SMEs and incorporating changes; proctor written tests; assist with appeals; administer performance-based assessment; and report scores. Molly McDonald, Mayra Prado, Elizabeth Wilson, Research Consultants, will be assigned the following tasks: review of performance-based exercises; performance-based assessment administration; score reporting; and reports. Finally, Steven Watkins, Information Technology Director, will oversee technology related tasks which include the design, development, and implementation of web-based instruments; overseeing all technical support operations; maintaining and monitoring the security of all electronic data; ensuring web-based systems maintain 99.9% SLA uptime; and maintaining and monitoring data contingency plan including data backup and archiving.

The team of key staff members outlined in the above paragraph will function in a similar manner for the project requested by Henrico County Police Division.

### ***Subcontracting***

Morris & McDaniel has a firm policy of performing all professional aspects of a project in-house in order to ensure that the work is performed at the highest level of performance.

Professional Staff	Individual Tasks
David M. Morris, Ph.D., J.D., MBA 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 Location: Memphis, TN	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. Senior Staff Consultant Judith Thompson, M.Ed. Vice-President of Psychometric Services	Assisting with quality of test instruments and any reports generated.
Jeff Rain, Ph.D. Mark Mincy, Ph.D. Senior Staff Consultants	Assisting 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; review of written tests and performance-based exercises; and conducting all statistical analyses.
Kimberly Anderson, M.S. Vice President of Operations	Data collection 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; assist with appeals; performance-based assessment administration; and score reporting.
Molly McDonald, B.A. Director of Testing Services Mayra Prado, M.S. Director of Statistical Analysis Elizabeth Wilson, B.A. Vice-President of Contract Performance and Client Services	Review of performance-based exercises; performance-based assessment administration; score reporting; and reports.
Steven Watkins Information Technology Director Location: Jackson, MS	Responsible for the design, development, and implementation of web-based instruments; overseeing all technical support operations; maintaining and monitoring the security of all electronic data; ensures web-based systems maintain 99.9% SLA uptime; maintains and monitors data contingency plan including data backup and archiving.

## **TAB 7: PRICING**

*In this tab, Offerors should provide an on site not-to-exceed price to perform all services as specified in the Scope of Services. The price proposal shall break out the various categories of tasks to be performed and should be structured in a manner that provides personnel classifications/ titles (not individual employee names) along with the corresponding hourly rate, multiplied by the estimated hours of the specific task, Additionally, Offerors shall provide an alternate price proposal for remote assessors.*

**HENRICO COUNTY POLICE DEPARTMENT  
RFP #25-2801-1ARA -PROMOTIONAL PROCESS CONSULTING  
PRICE PROPOSAL FOR THE RANK OF SERGEANT**

<b>MILESTONE ONE: Conduct Job Review and Analysis</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	2	\$ 432.60
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		<b>SUB-TOTAL</b>	<b>\$ 623.15</b>
<b>MILESTONE TWO: Best Practices Analysis</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	0	\$ -
		<b>SUB-TOTAL</b>	<b>\$ 865.20</b>
<b>MILESTONE THREE: Design Testing and Assessment Process</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		<b>SUB-TOTAL</b>	<b>\$ 1,246.30</b>
<b>MILESTONE FOUR: Prepare and Distribute Study Guide</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1	\$ 216.30
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		<b>SUB-TOTAL</b>	<b>\$ 597.40</b>
<b>MILESTONE FIVE: Conduct Candidate Orientation Sessions</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	3	\$ 648.90
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		<b>SUB-TOTAL</b>	<b>\$ 839.45</b>
<b>MILESTONE SIX: Administer and Score Written Knowledge Test</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	12	\$ 2,595.60
Senior Tech Staff	\$ 190.55	8	\$ 1,524.40
		<b>SUB-TOTAL</b>	<b>\$ 4,120.00</b>
<b>MILESTONE SEVEN: Administer Oral Assessment Exercises</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	10	\$ 1,905.50
		<b>SUB-TOTAL</b>	<b>\$ 3,635.90</b>
<b>MILESTONE EIGHT: Recruit, Train Raters/Oversee Scoring Structured Oral Process</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	16	\$ 3,048.80
		<b>SUB-TOTAL</b>	<b>\$ 4,779.20</b>

**MILESTONE NINE: Administer patent-protected Second Review to meet requirement for "challenge sessions".**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 1,246.30

**MILESTONE TEN: Provide candidate feedback**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	4	\$ 762.20
		SUB-TOTAL	\$ 1,627.40

**MILESTONE ELEVEN: Deliver final list and required reports**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1.5	\$ 324.45
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 515.00

**TOTAL PROFESSIONAL FEES - SERGEANT \$ 20,095.30**

**PRICE PROPOSAL FOR THE RANK OF LIEUTENANT**

**MILESTONE ONE: Conduct Job Review and Analysis**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	2	\$ 432.60
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 623.15

**MILESTONE TWO: Best Practices Analysis**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	0	\$ -
		SUB-TOTAL	\$ 865.20

**MILESTONE THREE: Design Testing and Assessment Process**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 1,246.30

**MILESTONE FOUR: Prepare and Distribute Study Guide**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1	\$ 216.30
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 597.40

**MILESTONE FIVE: Conduct Candidate Orientation Sessions**

ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	3	\$ 648.90
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 839.45

**MILESTONE SIX: Administer and Score Written Knowledge Test**

ROLE	HRLY RATE	EST HRS	EST FEE
------	-----------	---------	---------

Project Manager	\$ 216.30	12	\$ 2,595.60
Senior Tech Staff	\$ 190.55	8	\$ 1,524.40
		SUB-TOTAL	\$ 4,120.00
<b>MILESTONE SEVEN: Administer Oral Assessment Exercises</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	10	\$ 1,905.50
		SUB-TOTAL	\$ 3,635.90
<b>MILESTONE EIGHT: Recruit, Train Raters/Oversee Scoring Structured Oral</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	8	\$ 1,730.40
Senior Tech Staff	\$ 190.55	16	\$ 3,048.80
		SUB-TOTAL	\$ 4,779.20
<b>MILESTONE NINE: Administer patent-protected Second Review to meet</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	2	\$ 381.10
		SUB-TOTAL	\$ 1,246.30
<b>MILESTONE TEN: Provide candidate feedback</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	4	\$ 865.20
Senior Tech Staff	\$ 190.55	4	\$ 762.20
		SUB-TOTAL	\$ 1,627.40
<b>MILESTONE ELEVEN: Deliver final list and required reports</b>			
ROLE	HRLY RATE	EST HRS	EST FEE
Project Manager	\$ 216.30	1.5	\$ 324.45
Senior Tech Staff	\$ 190.55	1	\$ 190.55
		SUB-TOTAL	\$ 515.00
<b>TOTAL PROFESSIONAL FEES - LIEUTENANT</b>			<b>\$ 20,095.30</b>
<b>OPTION ONE -- ESTIMATED ASSESSOR FEES FOR ON SITE SCORING</b>			
Commercial flight expense, mileage expense, per diem , lodging and related for Sergeant			\$ 16,000.00
Commercial flight expense, mileage expense, per diem , lodging and related for Lieutenant			\$ 12,000.00
<b>TOTAL OVERALL COST OPTION ONE</b>			<b>\$ 68,190.60</b>
<b>OPTION TWO -- ESTIMATED ASSESSOR'S FEES FOR REMOTE PROCTOR SCORING</b>			
Commercial flight expense, mileage expense, per diem , lodging and related for Sergeant			\$ 12,000.00
Commercial flight expense, mileage expense, per diem , lodging and related for Lieutenant			\$ 6,500.00
<b>TOTAL OVERALL COST OPTION TWO</b>			<b>\$ 58,690.60</b>
<b>NOTE ONE: Pricing is based on the jurisdiction furnishing appropriate venues for events contemplated under this process.</b>			

**NOTE TWO: If additional testing is required due to any candidate's exigent circumstances, we will administer the process and integrate the results into the existing rank-ordered list for a flat fee price of \$5,000.00. We will modify existing testing instruments but will not develop new and separate testing instruments. Candidates will be required to sign a security agreement that they will not share information with subsequent test-takers and those candidates taking a delayed test will be required to sign a statement that they have not received any advance notice of test contents.**

## TAB 8: 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**



Lisette Camilo  
Commissioner

Mersida 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](http://nyc.gov/dcas)

DATE: APRIL 4, 2017

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



☆ 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

Close

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

#### Performance and Overall Quality

100%

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)

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

Answer :  Yes  
 No

#### Question 1.2

1.00

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

Answer :  Yes  
 No

#### Question 1.3

2.00

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

Answer :  Yes  
 No

#### Question 1.4

1.00

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

Answer :  Yes  
 No

#### Timeliness of Performance Rating

100.00

Answer :  Excellent  
 Good  
 Satisfactory  
 Poor  
 Unsatisfactory

Comment : All deliverables were received in a timely manner.

# **APPENDIX C**

## **Morris & McDaniel, Inc. Professional Staff Resumes**

**David M. Morris, Ph.D.**

Tel: (703) 944-9880

Email: [morrisd@morrisandmcdaniel.com](mailto:morrisd@morrisandmcdaniel.com)



*Yale School of Management*

## **PROFESSIONAL EXPERIENCE**

### **Morris & McDaniel, Inc.**

#### **1976 - Present**

Morris & McDaniel provides talent management services, with a primary focus in public safety. Guiding senior management on the creation and implementation of systems for staff development, compensation, retention and legal compliance, key clients include cities such as New York, Houston, and Chicago, and countries like Mexico, Iraq, and Uganda.

#### Selected U.S. Project Experience

- Developed written tests and conducted entry-level and/or promotional examinations for +250 public safety organizations in 28 States and D.C., from: California to New York, Massachusetts to Florida.
- Primary testing supplier to the NYPD and FDNY, the largest civil service in the U.S.; designed and implemented tests for high stakes supervisory roles, including Fire Captain (726 candidates) in 2020; Police Sergeant, Lieutenant and Captain (12,000 candidates) in 2017; and Fire Lieutenant (2075 candidates) in 2015.
- Devised a plan to increase diversity in the Philadelphia City Police in 1998. Tested +1000 entry-level recruits using a multiple-choice test combined with a structured oral process, resolving a years-long consent decree and the City's adoption of our procedures.
- Designed new tests for New Haven, CT, after a 2009 Supreme Court ruling that the City's testing system for Fire Lieutenants and Captains was discriminatory (ratio of white to minority candidates passing was 2:1). Since 2015, testing shows no statical differences in the pass rate of white and minority candidates, increasing diversity in senior roles.
- Designed a multiple-choice test and a structured oral process for the entry-level fire selection process for Austin, TX in 2014. Helped city successfully address racial discrimination challenges; Department of Justice voluntarily ended the consent decree after just four years.
- Redesigned the entry-level selection procedures for Kansas City, MO, to increase diversity, so that today the black representation in the department matches the relevant labor market, and women make up 13% (3 times the national representation of women in the fire service).
- Helped Houston redesign the promotional test for their fire department following the Bazile Court case in 2013, achieving greater diversity (increased Blacks in the passing list by 208%) and promotion of the best candidates regardless of ethnicity.

#### Selected International Project Experience

- Field tested innovative procedures evaluating police recruit honesty, October 2019, Mexico. Identified 5/44 recruits in San Louis Potosi and 13/106 recruits in Guanajuato for probationary monitoring based on susceptibility to cartel influence.
- Developed and conducted entry-level police officer screening procedures for +40,000 candidates, for the Ugandan Police Force in 2014. New recruits accurately mirror the composition of Ugandan society and its +80 constituent tribes.

- Developed and implemented a screening test for potential candidates for the Iraqi Police Service. From 2004–2007, +400,000 candidates were tested and +70,000 were approved, none of whom went on to turn a weapon on a colleague or a coalition force member.
- Invited by the Fijian Deputy Commissioner of National Police, Itendra Nair, to develop and conduct training to improve selection and promotions for first responders (police and fire) in 2019. To be completed post-pandemic.
- Engaged with Afghan Minister of Interior, Hanif Atmar, and U.S. agencies in 2009 to develop an entry-level police force test focusing on cognitive abilities without requiring literacy. Project discontinued due to tribal tensions.
- Invited by the South Sudanese Minister of Interior, Aleu Ayieny Aleu, to develop and conduct inter-tribal, job-related entry-level police officer screening and vetting procedures for the national police service. Project discontinued due to deterioration in the political stability of the country.

#### Selected speaking engagements

- Addressed 2013 INTERPOL General Assembly in Cartagena, Colombia on increasing diversity and strengthening police by improved selection and promotions (first non-public official keynote speaker).
  - Addressed seven FBI National Academy Associates Inc. Chapters’ Retrainer conferences since 2013, on strengthening internal security through diversity and resolving internal threats. Conference sessions attended by Ministers of Interior and /or Defense in Nepal, Thailand, Cambodia, Senegal, Indonesia, and the United States.
  - Served as expert witness in +30 legal cases, from District to Federal District Court levels, and state courts providing testimony on matters relevant to legal compliance with prevailing statutes. In the 1995 case *Mulderrig & Hunter v. the City of Philadelphia*, the judge cited the testimony Dr. Morris provided to be ‘credible and controlling’.
  - Visiting Faculty at Harvard Medical School (2001): *Contemporary Applications of Psychological Testing*.

#### EDUCATION

 Yale School of Management	EMBA Class of 2024
Academy for International Law, The Hague, the Netherlands	1985, 1986, 1987 sessions
Mississippi College School of Law <i>Juris Doctorate</i>	1976 - 1981
University of Southern Mississippi <i>Ph.D. Psychology, specialization in Industrial/Organizational Psychology</i>	1972 - 1975
Mississippi State University <i>Master’s in psychology (published first paper on psychology and immunology)</i>	1967 - 1969
Millsaps College, Jackson, Mississippi <i>Bachelor’s in Psychology</i>	1963 - 1967

## **SELECTED HONORS & PROFESSIONAL MEMBERSHIPS**

International Public Management Association (IPMA) Certificate of Merit for Work in Iraq 2007  
Service recognition certificates from Boston Police Commissioner and Georgia Chiefs of Police Association

Member of the American Psychological Association, Division 14 (Industrial/Organizational Psychology)

Member of the Society of Industrial and Organizational Psychology

## **SELECTED PUBLICATIONS**

***Professional Books*** (published by Lamar Publishing House, LLC)

Maximum Performance in the Fire Service Assessment Center, 2008

Maximum Performance on Entry-Level Police Exams, 2004

***Non-Professional Books*** (published by Lamar Publishing House, LLC)

The Adventures of Rocky the Christmas Tree Owl, David M. Morris, 2021

The Art and Mythology of The Da Vinci Code, David M. Morris, 2004

## ***Selected Published Tests***

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

## **SELECTED NEWS ARTICLES**

Saltzman, Amy. "Tactics for Managers - To Get Ahead, You May Have to Put on an Act." *U.S. News & World Report*, page 90 (May 13, 1991).

Chivers, C.J. "From Court Order to Reality: A Diverse Boston Police Force." *The New York Times*, VOL. CL... No. 51, 713 (April 4, 2001).

## **INTERESTS**

Retraced the steps of Marco Polo's iconic trip from Venice to inner Mongolia – overland, over 6 years

Swam the Hellespont twice, swam across and rafted down the Mississippi River (Memphis to New Orleans)

Studied the walks of Pericles in the Golden Age of Ancient Greece and retraced these journeys

**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 Marwill, and for Fire Communication ranks of Watch Commander and Senior Fire Operator for Memphis Fire Department for the City of Memphis, Tennessee.

Developed 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, Ph.D.**  
**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. Industrial/Organizational Psychology: Louisiana State University,  
Baton Rouge

Minors: Experimental Statistics and Clinical Psychology

1987, M.A. Industrial/Organizational Psychology: Louisiana State University,  
Baton Rouge

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

**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**  
**Vice President of Psychometric Services/Senior Staff Consultant**

**Education:**

*Doctor of Psychology (ABD), Expected May 2026*  
Psychology  
California Southern University

*Masters of Education, May 2001*  
Psychometry  
Mississippi College

*Bachelor of Science, May 1998*  
Education  
Emphasis: Diagnostic Reading and Fine Arts  
Belhaven College

**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**  
**Vice-President of Operations/Senior Staff**  
**Consultant**

**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

**MOLLY C. MCDONALD**  
**Director of Testing Services/Staff Consultant**

**Education:**

<b>1999 - 2001</b>	<b>University of Southern Mississippi</b> <i>B.A in Political Science, English minor</i>	Hattiesburg, MS
<b>1997 - 1998</b>	<b>University of Alabama</b>	Tuscaloosa, AL

**Professional Experience:**

**2003 – Present**      **Morris & McDaniel**

**Staff Consultant**

- Served 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**  
**Director of Statistical Analysis/Staff Consultant**

**Education:**

**2012 - 2014**                      **Kansas State University**                      Manhattan, KS  
*M.S in Psychology, Industrial/Organizational Psychology*

**2005 - 2009**                      **Belhaven University**                      Jackson, MS  
*B.S in Accounting, Business minor*

**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 WILSON**  
**Vice-President of Contract Performance & Client**  
**Services/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**

- Develops job analyses 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 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 proposals

**Recognition and Honors:**

**University of Mississippi**

- Dean's List 2006, 2010
- Academic and Tennis Full Scholarship, 2006-2010
- Graduated with 4.0 Psychology GPA

**STEVEN D. WATKINS**  
**Information Technology and Logistics Consultant**

**Education:**

**2012-2013**      A.A.S. in Graphic Design Technology; Hinds Community College

**Professional Experience:**

**2019 - Present**      **Morris & McDaniel**  
**Information Technology and Logistics Consultant**

- Serves as primary desktop support for Morris & McDaniel employees
- Assists in the development and implementation of upgraded and replaced network and security infrastructure
- Develops and designs video based exercises and QR code materials for assessment centers
- Assists all departments in document conversion and compatibility
- Serves as Microsoft 365, Azure Active Directory, and Ringcentral Administrator
- Coordinates the logistics and shipping of Assessment Center equipment to all client locations

**2019 - 2019**      **CDE Integrated Systems, Inc.**  
**VOIP Specialist**

- Installed, repaired, and conducted routine maintenance on VOIP-based telecom systems for business and residential clients
- Assisted in the installation and maintenance of IP based surveillance systems

**2017 - 2019**      **Toshiba Business Solutions, Inc.**  
**Copier Technician**

- Installed, repaired, and conducted routine maintenance on copier systems and print solutions for business and residential clients
- Conducted onsite and remote desktop support in relation to Toshiba copier systems
- Utilized live ticket queue applications for proper customer service interactions and scheduling

**2016 - 2017 TekSystems  
Contract Employee**

- Served an in-house desktop support and repair role for multiple large retail corporations, primarily focused on desktop, laptop, and point of sale systems
- Served roles as a traveling Point of Sale installer/technician for hotel and restaurant environments
- Served a role as a traveling desktop systems refresh technician for Hewlett Packard

**2015 - 2016 Best Buy  
Geek Squad Agent**

Assisted in sales and Customer Service for all store departments

Conducted Repairs and replacements for customer devices

Maintained sales targets and objectives for the Geek Squad department

**2014-2015 New South Ford Nissan  
Title Clerk, Automotive Sales Representative**

Conducted sales and customer service for automotive customers

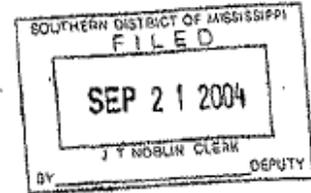
Prepared title and purchase documents post-sale, along with dealer transfer and wholesale purchase documentation, working directly under the dealer controller

Maintained monthly sales targets and objectives for the dealership

# **APPENDIX D**

**U.S. District Judge Walter Gex of United States  
District Court for the Southern District of Mississippi  
Southern Division**

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



WILLIE MORROW, et al.,  
Plaintiff, : Civil Action No. 4716 (G)  
 : Judge Walter J. Gex, III  
-vs- :  
 :  
JIM INGRAM,  
Commissioner of Public Safety :  
of Mississippi, et al. :  
Defendants. :

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 1<sup>st</sup> 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.

existence of this lawsuit, notice that there is a proposed settlement and that there will be an opportunity to file objections, and notice that a copy of this Settlement Agreement may be obtained in person or by mail from the Department of Public Safety, Personnel Office, P.O. Box 958, Jackson, MS 39205, between the hours of 8:00 A.M. and 5:00 P.M. on business days. The text of the published Notice is attached hereto as Attachment B.

35. Any objections to this Settlement Agreement must be in writing and postmarked to Michael L. Foreman, Esq., counsel for Plaintiffs, by ~~12:00 noon on 9/17/04~~ or they shall not be considered. *The date for filing objections is the date to be determined by the Court* The hearing on objections shall be held on ~~9/20/04 at 1:00 P.M. in Courtroom 1~~ *a date to be determined by the Court*. J. In the event that no objections are filed by the deadline, the proposed Settlement Agreement shall stand without further order of the Court as finally approved.

SO ORDERED:

  
Walter J. Gex, III.  
United States District Judge

Dated: September *17<sup>th</sup>*, 2004

# **APPENDIX E**

## **Financial Capacity**

## MORRIS &amp; MCDANIEL, INC.

## Profit &amp; Loss

02/05/25

January through December 2024

Cash Basis

	Jan - Dec 24
Ordinary Income/Expense	
Income	
400 · PROFESSIONAL FEES & SERVICES	4,840,060.07
410 · TEST SALES	
416 · TEST SALES - VA	80.00
410 · TEST SALES - Other	400,548.27
Total 410 · TEST SALES	400,628.27
415 · SHOPIFY SALES	117,054.56
430 · MISCLLEANOUS INCOME	3,209.15
Total Income	5,360,952.05
Cost of Goods Sold	
500 · COST OF TESTING	
501 · CONTRACT STAFF	
503 · ADJUNCT STAFF	508,076.80
504 · ASSESSING STAFF	182,552.92
506 · ITEM WRITING	107,065.00
507 · MINORITY VENDOR	182,403.82
Total 501 · CONTRACT STAFF	980,098.54
510 · ASSESSOR COST	
512 · ACCOMMODATIONS	96,358.47
514 · ONSITE MEALS	2,012.04
516 · PER DIEM	55,768.45
518 · TRAVEL	39,608.14
Total 510 · ASSESSOR COST	193,747.10
530 · STAFF COST	
532 · ACCOMMODATIONS	3,964.07
536 · MEALS	12,247.69
538 · TRAVEL	41,376.14
Total 530 · STAFF COST	57,587.90
542 · FACILITY FEES	188,494.66
544 · SUPPLIES & SHIPPING	3,826.19
500 · COST OF TESTING - Other	400.00
Total 500 · COST OF TESTING	1,424,154.39
Total COGS	1,424,154.39
Gross Profit	3,936,797.66
Expense	
615 · AUTOMOBILE	1,289.90
617 · BAD DEBT	12,014.02
620 · MISC EXPENSE	1.44
621 · FEES	
621-A · BANK FEES	911.03
621 · FEES - Other	27,747.86
Total 621 · FEES	28,658.89
623 · COMPUTER/EQUIPMENT LEASES	7,267.18
624 · COMPUTER SUPPLIES & SOFTWARE	14,625.95
625 · COMPUTER REPAIR	4,326.70

## MORRIS &amp; MCDANIEL, INC.

## Profit &amp; Loss

January through December 2024

	Jan - Dec 24
630 · DONATIONS	2,300.79
636 · DUES & SUBSCRIPTIONS	5,410.63
638 · SHREDDING	6.11
639 · LEASE / EQUIPMENT RENTAL	248.90
645 · INSURANCE - HEALTH	102,168.09
648 · INSURANCE - COMMERCIAL	21,404.23
649 · INSURANCE - LIABILITY	2,762.40
651 · INTEREST	38,374.97
654 · JANITORIAL	28,984.49
655 · LEGAL & ACCOUNTING	92,808.55
656 · SALARY & WAGES	
COMMISSION	132,029.21
HEALTH INSURANCE - ER PAID	33,989.86
HOURLY	343,135.13
SALARY	1,552,936.14
VIDEOS	4,625.00
656 · SALARY & WAGES - Other	77,730.62
Total 656 · SALARY & WAGES	2,144,445.96
658 · PAYROLL TAXES	
COMPANY 401(k)	60,987.83
COMPANY FICA	118,844.03
COMPANY FUTA	1,161.75
COMPANY MEDICARE	30,404.86
MS UNEMPLOYMENT	507.98
658 · PAYROLL TAXES - Other	-1,212.45
Total 658 · PAYROLL TAXES	210,694.00
659 · EMPLOYEE EXPENSE	16,696.39
660 · TAXES, LICENSES & PERMITS	
ALABAMA	14.00
ARIZONA	40.00
CALIFORNIA	1,893.80
CONNECTICUT	8,084.52
DISTRICT COLUMBIA	-389.29
FLORIDA	40.97
GEORGIA	5,048.80
LOUISIANA	1,993.72
MARYLAND	303.00
MASSACHUSETTS	183.80
MICHIGAN	0.41
MISSISSIPPI	4,543.63
MISSOURI	630.86
NEW JERSEY	152.00
NEW YORK	16,481.44
NORTH CAROLINA	5,272.00
TENNESSEE	1,356.75
TEXAS	4,854.68
VIRGINIA	21,166.39
660 · TAXES, LICENSES & PERMITS - Other	-202.36
Total 660 · TAXES, LICENSES & PERMITS	71,469.12
663 · MAINTENANCE & REPAIRS	34,849.87
665 · SECURITY SYSTEM EXPENSE	6,541.66
666 · MARKETING & ADVERTISING	-729.27
669 · CONTRACT SERVICE	360,108.66

**MORRIS & MCDANIEL, INC.**

**Profit & Loss**

January through December 2024

	<u>Jan - Dec 24</u>
672 · POSTAGE, FREIGHT & EXP MAIL	106,941.89
675 · PRINTING	380.09
676 · GIFTS AND FLOWERS	48.15
677 · STORAGE	354.99
678 · RENT	112,731.72
682 · CONTINUING EDUCATION	18,001.65
684 · SUPPLIES	18,872.64
690 · TELEPHONE	5,824.61
693 · TRAVEL	452.31
694 · MEALS & ENTERTAINMENT	186.12
696 · UTILITIES	18,282.52
<b>Total Expense</b>	<u>3,488,806.32</u>
<b>Net Ordinary Income</b>	<u>447,991.34</u>
<b>Net Income</b>	<u><u>447,991.34</u></u>

## MORRIS &amp; MCDANIEL, INC.

## Profit &amp; Loss

02/05/25

January through December 2023

Accrual Basis

	Jan - Dec 23
Ordinary Income/Expense	
Income	
400 · PROFESSIONAL FEES & SERVICES	6,462,183.96
410 · TEST SALES	353,002.38
415 · SHOPIFY SALES	0.00
430 · MISCLLEANOUS INCOME	22,792.91
Total Income	6,837,979.25
Cost of Goods Sold	
500 · COST OF TESTING	
501 · CONTRACT STAFF	
503 · ADJUNCT STAFF	503,335.48
504 · ASSESSING STAFF	254,935.74
506 · ITEM WRITING	94,709.00
507 · MINORITY VENDOR	267,929.65
Total 501 · CONTRACT STAFF	1,120,909.87
510 · ASSESSOR COST	
512 · ACCOMMODATIONS	117,672.12
514 · ONSITE MEALS	27,864.25
516 · PER DIEM	47,583.63
518 · TRAVEL	104,503.64
Total 510 · ASSESSOR COST	297,623.64
530 · STAFF COST	
532 · ACCOMMODATIONS	219,158.99
536 · MEALS	81,193.08
538 · TRAVEL	238,779.30
Total 530 · STAFF COST	539,131.37
542 · FACILITY FEES	166,005.41
544 · SUPPLIES & SHIPPING	47,467.19
Total 500 · COST OF TESTING	2,171,137.48
Total COGS	2,171,137.48
Gross Profit	4,666,841.77
Expense	
COPIER - LEASES, REPAIRS, USAGE	65,438.21
FEDERAL CORP INCOME TAX	133,423.00
611 · DISCOUNT	10,265.00
615 · AUTOMOBILE	14,683.26
617 · BAD DEBT	360.00
620 · MISC EXPENSE	3,413.28
621 · FEES	24,000.76
623 · COMPUTER/EQUIPMENT LEASES	9,026.85
624 · COMPUTER SUPPLIES & SOFTWARE	152,681.57
625 · COMPUTER REPAIR	20,166.96
629 · STATE CORP INCOME TAX	26,667.00
630 · DONATIONS	1,229.18
636 · DUES & SUBSCRIPTIONS	32,142.53
638 · SHREDDING	5,996.54
645 · INSURANCE - HEALTH	126,249.40
648 · INSURANCE - COMMERCIAL	42,035.33
649 · INSURANCE - LIABILITY	11,920.71
651 · INTEREST	9,030.37
654 · JANITORIAL	26,395.94
655 · LEGAL & ACCOUNTING	67,515.68

**MORRIS & MCDANIEL, INC.****Profit & Loss**

02/05/25

Accrual Basis

January through December 2023

	Jan - Dec 23
<b>656 · SALARY &amp; WAGES</b>	
BONUS	16,500.00
COMMISSION	144,607.53
HEALTH INSURANCE - ER PAID	0.00
HOURLY	420,246.35
SALARY	1,386,384.94
VIDEOS	4,612.50
656 · SALARY & WAGES - Other	42,302.66
<b>Total 656 · SALARY &amp; WAGES</b>	<b>2,014,653.98</b>
<b>658 · PAYROLL TAXES</b>	
COMPANY 401(k)	58,801.70
COMPANY FICA	114,524.58
COMPANY FUTA	1,299.83
COMPANY MEDICARE	28,940.12
MS UNEMPLOYMENT	0.03
658 · PAYROLL TAXES - Other	952.48
<b>Total 658 · PAYROLL TAXES</b>	<b>204,518.74</b>
<b>659 · EMPLOYEE EXPENSE</b>	<b>20,753.97</b>
<b>660-2 · FEDERAL TAXES</b>	<b>128,700.00</b>
<b>660 · TAXES, LICENSES &amp; PERMITS</b>	
ARIZONA	110.00
CALIFORNIA	1,327.30
COLORADO	1.00
CONNECTICUT	1,048.00
DISTRICT COLUMBIA	250.00
FLORIDA	203.75
GEORGIA	-363.67
ILLINOIS	76.69
LOUISIANA	1,397.00
MARYLAND	803.00
MASSACHUSETTS	420.00
MICHIGAN	50.00
MISSISSIPPI	1,608.58
MISSOURI	198.60
NEW YORK	1,407.00
NORTH CAROLINA	71.67
TENNESSEE	174.60
TEXAS	4,698.25
VIRGINIA	3,769.79
<b>Total 660 · TAXES, LICENSES &amp; PERMITS</b>	<b>17,251.56</b>
<b>663 · MAINTENANCE &amp; REPAIRS</b>	<b>3,433.78</b>
<b>665 · SECURITY SYSTEM EXPENSE</b>	<b>9,154.40</b>
<b>666 · MARKETING &amp; ADVERTISING</b>	<b>3,386.13</b>
<b>669 · CONTRACT SERVICE</b>	<b>326,959.79</b>
<b>672 · POSTAGE, FREIGHT &amp; EXP MAIL</b>	<b>89,238.46</b>
<b>676 · GIFTS AND FLOWERS</b>	<b>552.83</b>
<b>677 · STORAGE</b>	<b>4,180.00</b>
<b>678 · RENT</b>	<b>112,731.72</b>
<b>682 · CONTINUING EDUCATION</b>	<b>33,066.35</b>
<b>684 · SUPPLIES</b>	<b>110,748.39</b>
<b>690 · TELEPHONE</b>	<b>42,906.95</b>
<b>691 · TELEPHONE EQUIPMENT</b>	<b>117.68</b>
<b>693 · TRAVEL</b>	<b>73,587.12</b>
<b>694 · MEALS &amp; ENTERTAINMENT</b>	<b>20,348.59</b>
<b>696 · UTILITIES</b>	<b>30,293.95</b>

**MORRIS & MCDANIEL, INC.**

**Profit & Loss**

**January through December 2023**

**Accrual Basis**

	Jan - Dec 23
705 - Office Expense	1,060.56
<b>Total Expense</b>	<b>4,030,286.52</b>
<b>Net Ordinary Income</b>	<b>636,555.25</b>
<b>Net Income</b>	<b>636,555.25</b>

**TAB 9: ASSUMPTIONS**

*In this tab, offerors shall list any assumptions made when responding to this Request for Proposals.*

Assumptions made when responding to this Request for Proposals is not needed.

## **TAB 10: EXCEPTIONS**

*In this tab, offerors shall list any exceptions taken to the Scope of Services and General Terms and Conditions of this Request for Proposals. The County intends to make the RFP and the Successful Offeror's proposal a part of the contract between the parties, so Offerors should list any exceptions for purposes of negotiating the contract.*

Morris & McDaniel, Inc. agrees to the terms and conditions as set forth in the County's Request for Proposal.