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News Release

Date: November 16, 2011

Time: 8:30 a.m.

Contact: Steve Carter, City Manager - City Manager's Office, (217) 403-8710

City Manager to Appoint Holly Nearing to Serve as Interim Chief of Police City Manager to Work with Police Leadership to Rebuild Open Communications

CHAMPAIGN, ILLINOIS--- City Manager Steve Carter will appoint Deputy Chief Holly Nearing to serve as Interim Chief of Police effective December 5, 2011 until the new Chief of Police assumes command. Carter will announce this to Police personnel in a series of department meetings today. The decision to appoint an Interim Chief was made to assure a stable leadership transition and maintain a high level of responsive service to the community, also allowing Chief R.T. Finney to use accumulated leave time prior to his retirement date of January 20, 2012.

Holly Nearing is a 29-year veteran of the Champaign Police Department and currently serves as Deputy Chief of Professional Standards. She is the accreditation manager, and is responsible for Internal Affairs, Citizen Complaints, Training, Evidence, Front Desk and Records. Nearing's first 5 years were as a patrol officer, then 6 years as a detective. She was promoted to patrol sergeant in 1994, a capacity she held for 3 years before being promoted to lieutenant. As a lieutenant, Nearing supervised three different functions: the South patrol district and Field Training Officer Unit, Investigations, Training and Grants. Nearing was promoted to the rank of Deputy Chief in June 2007. She is a graduate of the Northwestern University School of Police Staff and Command (105th) and holds a masters degree in Public Administration from Governors State University, and a BS in Psychology from the University of Illinois.

-More-

City Manager Steve Carter will work closely with Nearing and the Police Management Team to address internal issues that were recently raised in an anonymous email sent to City Officials on August 18, 2011. In response to the email, Carter directed the Police and Human Resources Department to research the issues, document the facts, and provide a written report in response. He also invited all Police Department employees an opportunity to meet with him and share their ideas and concerns.

The City Manager issued a Report to the City Council yesterday with his findings and recommendations from this process. (Report to City Council is attached.) According to Carter, “the City has a responsibility to the public and to our employees to take all concerns about our operations seriously.” The report recommends changes to the Police Department’s promotional processes and also addresses the need to build more open communications within the department. The report further states Carter’s expectation that the new Chief of Police work with the entire command staff to rebuild trust, assure effective decision-making and promote a culture of fair, open, and honest communication.

“I came away from my meetings with employees encouraged about the future of the department,” Carter said. “We have excellent men and women who want to excel in their careers and want their department to function as a high performance police department, earning the respect of their peers and the community.”

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REPORT TO CITY COUNCIL

FROM: Steven C. Carter, City Manager  **INFORMATION ONLY**

DATE: November 15, 2011

SUBJECT: REPORT ON THE AUGUST 18, 2011 ANONYMOUS EMAIL REGARDING THE POLICE DEPARTMENT

A. Introduction: The purpose of this memorandum is to report on the City Manager’s review of anonymous allegations made in an August 18 email regarding the Champaign Police Department. This report summarizes findings and recommendations as a result of this review.

B. Review Process: The City has a responsibility to the public and to our employees to take all concerns about our operations seriously. There are often many perspectives on any issue, requiring thoughtful review and consideration of all the facts.

Upon receipt of the email, I directed the Police and Human Resources Departments to research the issues, document the facts, and provide a written report in response. Issues posed included the 2008 and 2011 Lieutenant testing processes and various internal Police Department matters. The reports from Police and Human Resources are attached.

In addition, I invited all Police Department employees to share any concerns they might have. As a result, I met with several department employees, representing all ranks, and both civilian and uniformed employees, to gather information and insight. It was important to ascertain the facts to the extent possible, but to also understand the departmental dynamics and impact on individuals.

C. Summary of Findings and Recommendations: Following are my findings and recommendations after completing my review:

1. 2008 Lieutenant’s Promotional Exam Process.

***Concern:** The fairness of the testing process was questioned, based in part because one candidate received a very high score on the written exam.*

***Finding 1:** There is no indication of any wrongdoing with respect to the exam.*

The Board of Fire and Police Commissioners approved the testing process, and all candidates were notified of the process in advance. This included approval of the reading materials for the exam, which had been used in one or two prior exams. The Police Chief

took personal charge of the exam when a concern was expressed about test security. While the testing company's correspondence indicates that such a high score was unusual, similar high scores have been achieved by Champaign Police Department personnel on past exams.

Finding 2: *Communication gaps between the Human Resources Department, the Police Department, and the testing company contributed to the perception that the testing process was not secure.*

While at various times there was communication between each of the departments and the testing company, all persons involved in the process were not consistently in the communication loop. This left gaps in any one individual's understanding of the status of the process and confusion over who was to follow up at various stages.

Recommendation: The Human Resources Department should be responsible for overseeing all hiring and promotional processes to insure that promotional exams reflect best practices, comply with the process approved by the Board of Fire and Police Commissioners, and the examination process is secure. The Police Department should coordinate with Human Resources to ensure best practices and that consistent and clear communication is maintained with candidates and persons involved in the testing process. (This was done for the 2011 Lieutenant exam.)

2. 2011 Lieutenant's Promotional Exam Process.

Concern: *There was wide variance in how individual Police Department raters scored the same candidates, leading to a perception that the departmental rating portion of the exam was biased.*

Finding: *The 2011 exam process featured many changes consistent with best practices, including expanding the number of departmental command staff members who were involved in providing candidate ratings.*

The Board of Fire and Police Commissioners approved the testing process, and all candidates were notified of the process in advance. This included a change in the way that departmental ratings would be scored. In addition to the Chief and Deputy Chief ratings, Lieutenants were also included in the rating process to provide a broader view of candidate performance. However, the departmental ratings are an individual's subjective opinion about how successful a candidate may be in the new position. Ratings for individual candidates covered a wide range, with some raters scoring them high and others scoring the same candidates low.

Recommendation: The City should replace the departmental rating and oral interview components of Police promotional exams. The employee's past performance appraisal ratings should be a component of the promotional evaluation and candidates should participate in an assessment center process. This change is similar to a process change implemented for Fire Department promotional exams a few years ago. (This was presented to the Board and Fire and Police Commission on October 24, 2011 and is proposed for the upcoming sergeant exam.)

3. Internal Police Department Challenges.

Concern 1: There is a perception of favoritism in department decision-making and personnel assignments.

Concern 2: Some employees were not treated consistently with City and department values.

Finding 1: In many of the examples cited, there were valid reasons for department decisions. However, the department has not consistently communicated the rationale for decisions down through the chain of command. There have also been situations when Police command staff have not been receptive to ideas, questions, or concerns raised by department personnel.

A number of Police Department decisions were made in consultation with the City Manager's Office or with direction from the City Council or the City Administration. However, this information was not cascaded through the chain of command, contributing to misunderstandings and false expectations on the part of some personnel within the department. While every employee may not have fully understood the basis for each decision, the decisions were not flawed.

In some instances when employees approached command staff with questions or suggestions, they did not feel the command was receptive. This is inconsistent with the City's organizational values which call for a safe workplace environment where employees feel comfortable actively participating in an open and honest exchange of ideas and concerns; where employee ideas are encouraged and respected, and employees do not fear retaliation or repercussions for expressing dissenting points of view.

Finding 2: In some cases, employees were not treated consistently with City values and this has contributed to a perception of unfairness.

Throughout my interviews, a number of Police personnel described situations of disrespect and lack of fair process when employees raised issues within the department. These situations get communicated within the department and have contributed to a developing perception of favoritism and differential treatment. While these situations are not widespread, they are impacting working relationships within the department.

Finding 3: Distrust has developed among employees; which is impacting the department in many ways.

As a result of these events, employee distrust is building and hard feelings are negatively impacting employees' ability to work effectively together. The public attention on these issues has further contributed to divisiveness within the department.

Recommendation 1: In preparation for the arrival of a new Chief, the City Manager's Office will work with the Police management team to further work on the issues raised by department personnel. The City Manager will meet regularly with the Interim Chief, Deputy Chiefs and Lieutenants to maintain open communications and provide leadership

on resolving problems and concerns in a timely manner. Meetings will also be scheduled with FOP and AFSCME representatives as needed to discuss issues that impact bargaining unit members. In addition, the Administration will identify training opportunities to develop the organizational communication skills of management personnel. The emphasis during this time will be to encourage a culture of open communication between department leadership and employees to build unity and help the department to better serve the community and face the challenges of the future.

Recommendation 2: The goals for the new Police Chief will include the expectation to provide day to day leadership for the entire command staff to rebuild trust, assure effective decision-making and promote a culture of fair, open and honest communication.

Conclusion: In reviewing the anonymous email and the findings and recommendations of this report, it is important to recognize that the past few years have been more stressful than normal for the Police Department. In addition, the recent severe recession resulted in several years of major budget cuts in the Police Department as well as other City departments, leading to many difficult decisions that impacted all employees. Similar to police departments in other cities, we are anticipating several retirements among senior police management in the next few years, creating greater interest in promotional processes and uncertainty about future changes. During stressful times and times of change, organizational conflict is to be expected and will take some time to work through.

I came away from my meetings with employees encouraged about the future of the department. I found everyone very open and honest about their experiences and feelings. I was impressed by their commitment to public service and law enforcement. I am encouraged by their vision for the department. We have excellent men and women who want to excel in their careers and want their department to function as a high performance police department, earning the respect of their peers and the community.

cc: All Police Department Personnel

Attachments: Report to Council re: 2008 and 2011 Police Lieutenant Eligibility Lists
Report from Chief RT Finney re: Integrity of Command Email

MEMORANDUM

TO: Steve Carter, City Manager
FROM: R.T. Finney, Chief of Police
DATE: August 29, 2011
REFERENCE: Integrity of Command E-Mail

Per your request, this memorandum will address the allegations contained in the E-Mail titled "Integrity of Command. The themes in this e-mail are numerous and arduous to connect. I will attempt to address them as straightforward as possible.

The meeting with the City Staff at the Library concerned the Lieutenant testing process of 2008. For many years the Police Department has coordinated the various promotional exams with City Personnel. This task was usually assigned to a Lieutenant, often times the Training Lieutenant. In recent history the test was coordinated by Lt. Paulus, Lt. Nearing (now Deputy Chief Nearing) and others. After the creation of the Fourth District, and the elimination of the Training Lieutenant to staff that district, other staff members had to assume those duties. At the time of the 2008 examination preparations, the assignment was given to Lt. Swan. He coordinated the examination with Personnel and the testing company, Stanard and Associates. It was not until after the reading list was already established and candidates had begun to study these texts, that I heard from two individuals that they had concerns over Lt. Swan's administration of the exam. Neither had any evidence or knowledge of any impropriety by Lt. Swan, both simply expressed that Swan was a friend of Walker who was a friend of Deputy Chief Murphy. Based on this "opinion" I took the following action.

- 1.) I removed Lt. Swan from testing process. I assured he possessed no final material for the test. I also established a Department protocol that promotional exams must be administrated by at least one rank above the rank being tested.
- 2.) I contacted the testing company and advised them that I would be their contact for any testing material and/or changes to the test.
- 3.) After the reading list was established, I contacted the company to determine the possibility of providing a new exam. Stanard and Associates indicated that they could provide me with a different variation of questions on the same material but could not change the entire exam without changing the reading material.
- 4.) I established a new interview process that would use panels instead of just topic experts to administer and interview the candidates.
- 5.) I possess the UPS package, letter from Stanard and Associates, test with the new questions, and the oral interview process. These items are addressed to me, were reviewed by me, and have been in my possession since 2008.

This process was conveyed to HR and discussed with the City Manager. The allegation that Scott Swan was providing testing material to Sgt. Walker was never

pursued because there was no evidence that it occurred. Scott Swan never possessed the final testing material. After the testing was complete, any personnel who inquired about the fairness of the exam were advised that I changed the test and the oral interview. (SEE ATTACHED EXAM NOTING NEW 08 QUESTIONS)

The author(s) take issue with the justification to upgrade Sgt. Walker to Lieutenant. It is very common when an upgrade is considered that the person considered for that upgrade is the first person on the promotional list. The decision was discussed with the entire senior command staff. Ultimately, the decision was reviewed and approved by the City Manager. This was a very open and transparent decision making process. It allowed the Department to achieve both Accreditation and to pursue the concept of Intelligence Led Policing. Once these projects were completed, the eventual downgrade caused Lt. Walker to go back to his previous position of Narcotics Sergeant. Because of that change, Sergeant Baltzell went back to his previous position as the CAT team supervisor. These were operational and financial decisions that included Staff, the City Manager, and the City Council.

The E-mail continues with the allegation that I attempted to extend the promotional list. The content of that e-mail, which was sent only to the Director of HR is as follows:

March 16 2011

Chris;

The Lieutenants test is about to expire on June 27, 2011. As you know these tests are very expensive. The most recent test has never been used to pick a candidate, however, with the VSIP it appears that there may be one or two Lieutenants leave within days or weeks after the test expires. Is there a provision for extending the use of the current test, possibly for 6 months or a year. We are assured to get some value from both the old and the new one in that time period. Any thoughts?

The purpose of this inquiry was because of the cost of examinations and the fact that VSIP's could have depleted a significant number of senior staff members very quickly without a current list pending. In fact, this did occur, however, it was during the period of time the 2008 list was active. I was contacted by HR concerning the possibility of upgrading a Lieutenant because of Lt. Swan's retirement. Below was my recommendation.

June 9, 2011

>>> RT Finney 6/9/2011 3:13 PM >>>

In the event of Lt. Swan's departure, and because the promotional exams are occurring, I have discussed with Chris not immediately filling this position until after the promotional exam. This will cause an absence of approximately 6 weeks, but we can cover it with current Lieutenants and the Deputy Chief.

R.T. Finney

>>>Steve Carter>>>

I think that would be very desirable.

Steve Carter

City Manager

steve.carter@ci.champaign.il.us

I chose to delay the process to allow the new examination to be completed instead of promoting off the older list.

The meeting at the Library is alleged to have resulted in adverse results to those who attended. The City Manager advised me that the concerns were basically over the 2008 promotional examination and the request that the 2011 examination be conducted fairly. This meeting resulted in HR taking over the 2011 process, with very limited participation by the Department. (See HR's memo regarding the 2011 promotional process.) The E-

mail implies that some personnel were unfairly targeted afterwards as a result their attendance. I will address these situations as they are listed in the E-mail

Sgt. Friedlein submitted a memo to me on October 22, 2009 giving a minimum of a year advanced notice of his intent to retire. The purpose of the memo is basically to secure a larger sick leave buy back, but it also gives the employer opportunity to plan for replacement or changes to the position. Since 2009, reductions have been a large topic of budget discussions. Many brainstorming meetings have been held from 2009-2011 to manage budget reductions and results of budget reductions. In January 2010, Sgt. Friedlein's position was identified in a document dated January 25, 2010 and titled: Study Area/Future Planning Proposal FY 2010/2011. The text reads as follows; *"Professional Standards Sergeant Position: Sgt. Friedlein has notified the Department that he could leave his position as early as November of 2010. His responsibilities include Alcohol enforcement, Special events and Background Investigations for new hires. When he leaves, the Department will have the opportunity to examine how the duties of this position are distributed."*

In budget discussions that ensued within the police department during July and August 2010, the combining of the Training Sergeant's job (Clark) and the Professional Standards/Alcohol Enforcement Sergeant's job (Friedlein) was discussed in more detail. It was clear that to meet the goal of over \$600,000 in budget cuts, salaries (positions) would have to be the focus. The reduction of Sgt. Friedlein's position was a natural decision, due to his informing us he was leaving. By December, 2010, Sgt. Friedlein informed me that he might not be leaving until January, 2011. In early 2011, Sgt. Friedlein then stated he hoped to be gone by summer of 2011, but he had no idea how long it was going to take to find a post-retirement job. In the spring of 2011, Police Department budget cuts were being finalized, and were about to be approved by City Council. The budget and position cuts were to take effect June 30, 2011. On March 29, 2011, HR and police department management met with the FOP and Sgt. Friedlein to formally advise him about his position being cut, and what some of his options might be. The FOP met with the HR director on behalf of Sgt. Friedlein. The FOP informed me later that one of the arguments made on behalf of Sgt. Friedlein remaining in his Professional Standards position was that a new mayor had been elected, and would need experienced personnel to assist him with his role as the City's Liquor Commissioner. It was decided that Sgt. Friedlein could remain in his position until the new Mayor could determine if there would be substantial changes to the Liquor program. This would allow a smoother transition.

Toward the end of July 2011, Deputy Chief Murphy became aware of a large amount of upcoming overtime in the patrol sergeant ranks due to an off-duty long-term injury and sergeants becoming fathers (FMLA). I approached the City Manager's office about temporarily upgrading a person off the sergeant eligibility list to cover some of these vacancies. At that time, the police department was informed that the sergeant rank was overstaffed by one, because Sgt. Friedlein's position was cut from the budget. The direction was to make that transition before any other upgrades occurred. Subsequently, his supervisors met with Sgt. Friedlein (on August 3, 2011) to advise him that it was likely he would be moved to Patrol.

The email contained a section related to a decision made by Sgt. Rea to conduct training in the Bristol Place neighborhood. The training was intended to allow the SWAT team to work on raid/breaching techniques. There had been no previous contact with the neighborhood, and the "police training in progress" signs had only been placed approximately 30 minutes before the training began. I was contacted by Council Member

Kyles on the day of the training who had been contacted by residents with concerns. I advised him that I was unaware of the training taking place and promptly contacted Sergeant Rea. In a phone conversation with Rea I asked about the training and if he had made contact with neighbors or his supervisors. Sergeant Rea stated, "I dropped the ball". I later was contacted by Deputy Chief Murphy who advised me that Rev. Barnes had sent him an email expressing his concerns over the training.

The follow up actions included a directive to the entire SWAT team leadership and those who held an official supervisory position to write memos documenting their actions. Additionally, Deputy Chief Murphy and I met with Sgt. Rea about this issue. Rea refused to acknowledge that the decision to train in the Bristol Place neighborhood was problematic. Given his rank and his tenure with the department, we agreed this was a problem. The meeting ended with an understanding that the SWAT team would adhere to certain notification protocols and approval at training venues. Rea was not disciplined for the incident; he was merely advised of the problem and the expectations of the Department on future training. This incident was discussed with the City Manager and all email communications were forwarded to him.

The Champaign Police Department has participated in the Special Olympic Run, at times escorted the torch all the way to Bloomington. This issue seems to be centered on the fact that Sgt. Frost requested to take five squad cars and personnel to escort runners from Champaign to Bloomington. The reason for the denial was because only two runners were signed up to run the route. Those two runners were Sgt. Griffet and me. Instead we ran from the east boarder of our community, accepting the Torch from Urbana and then ran it to Parkland. The Special Olympics Torch was scheduled to be transferred from that location to other agencies.

The E-mail questions the use of overtime for the Illinois Association of Chiefs of Police state conference. The Conference brought nearly 150 people into our community including dignitaries from the Lt. Governor to several State Representatives. We used four hours of time between three officers to assist with directions and transportation from two venues. This time was approved and coordinated by Deputy Chief Troy Daniel, the conference coordinator.

Since I did not participate in the oral exam I asked the applicants to create a lesson plan and give a presentation to a community group on Intelligence Led Policing. The ability to conduct a community presentation is very important in their role as a Lieutenant. Since all the Sergeants had been trained by Dr. Boba the topic was very familiar to them.

Sgt. Clark came to my office to inquire about the documentations that I had referred to in the meeting. I provided him the City Ordinance and the Board Rules and how I interpret them. It had not been determined what standing the policy had over the City Ordinance and Board Rules. Sgt. Clark was advised that he could come to me to ask any questions he had in the future on this topic. This was not "condemning" him for his meeting at the Library.

After the Lieutenant's upgrade was ended by Council action all supervisors filling upgrades returned to their former positions in the Department. Sgt. Baltzell had been assigned to oversee the Narcotics Unit in an acting capacity. He filled that position during the time Sgt. Walker served as a lieutenant. Sgt. Walker was re-assigned to his original position and Sgt. Baltzell remained in his position as the CAT supervisor. The move(s) did not require Baltzell to change offices or significantly change his duties. He returned to a 4/10 schedule. Sgt. Walker returned to his previous position in the Narcotics Unit.

Office Allen made a suggestion regarding budget cuts, about which Deputy Chief Murphy responded:

“I misjudged my audience and vented to Sgt. Clark about an e-mail Officer Allen had sent during the height of the budget process. We had been working diligently to achieve our assigned budget level cuts when Allen authored an e-mail suggesting that a member of management needed to be cut, so that “they could share the pain.” I was aggravated by the comment as it was suggested as a “symbolic” step and only added (negatively) to the frustration surrounding the larger goals. Evidently, Jim Clark shared my comments with David Allen. I had frequent conversations with Sgt. Clark as he routinely came to my office asking for resources, support, or exceptions to staffing on behalf of the Crime Scene Unit. I should have been more selective in whom I vented to and I accept responsibility for this statement.”

Conclusion:

The 2008 promotion allegation is completely inaccurate and some of those supervisors mentioned within this E-mail were advised of the changes that were made in 2008 to address these concerns. The test was never shared with anyone after I received the final exam and I was the only Department member who worked with the company to make the necessary changes on the final product.

The 2011 testing was administered by HR. Some of the raters openly expressed to HR the problems they saw with the rating tool. It was the opinion of some of the raters that the scale was too narrow and based on only three possible values. In addition, they did not prefer to rate someone who was not or had not served under their command. However, statistically, one rater could not substantially affect the score. If lower scores were given, several raters had to have a similar opinion in order to affect the score. The process provided by HR allowed those raters to address these concerns with each of the raters. Understanding that a promotional period that occurs every three years is a stressful time for these sergeants, however we should not lose perspective that their everyday work history cannot be articulated in ten areas with only three rates. However, it is important for supervisors to provide some type of feedback for the promotional process.

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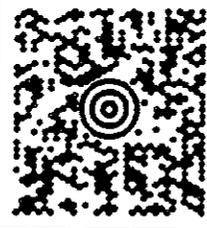
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Stanard
& Associates, Inc.

May 6, 2008

Chief Finney
Champaign Police Department
82 East University Avenue
Champaign, IL 61820

Dear Chief Finney,

I am enclosing for your review the 2008 Champaign Police Department Lieutenant Promotional Exam. For each item, the top line contains the name of the source, its location in the material and the correct answer. Obviously, this top line will not exist in the final test form.

Please review these test items for accuracy and relevance. Once you have had a chance to review the exam, please contact me and I will make any necessary changes and prepare the final test copy.

Since the exam will be held on Tuesday, May 20th, it would be best to have communicated your revisions to me by Tuesday, May 13th. I can be reached via e-mail (heather.leffler@stanard.com) or phone (312.553.0213).

In closing, we ask that you be very careful about maintaining test security. Please feel free to call me if you have any questions.

Sincerely,

Heather Leffler, M. S.
Consultant
Stanard & Associates, Inc.
309 W. Washington St., Suite 1000
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heather.leffler@stanard.com

**Champaign Police Department
Lieutenant Promotional Test
March 2008
ANSWER KEY**

Items Written from General Orders

Release of Criminal Case Information and Records p.1 C

1. According to the Champaign Police Department General Order regarding the release of criminal case information and records, when a crime such as armed robbery has been committed and prior to arrest, which of the following information may not be released?
- A. Information as to the identity of the suspect to warn the public of any dangers
 - B. The location where the offense was committed
 - C. The suspect's criminal record
 - D. The results of the investigative procedure to assist in apprehension of the suspect

Anti-Biased Policing p.1 C

2. According to the Champaign Police Department General Order regarding anti-biased policing, when a police officer makes a decision to stop and question a person using the race of the person as the sole indication of suspicious activity, it is called
- A. counter terrorism precautions
 - B. harassment
 - C. racial profiling
 - D. racial discrimination

Anti-Biased Policing p 3 C
New08

3. According to the Champaign Police Department General Order regarding anti-biased policing, which of the following is listed as one of the factors the Police Intelligence Function of the Champaign Police Department will assess in deciding what public events, demonstrations or situations to monitor?
- A. The amount of media attention anticipated for the event
 - B. The probability that individuals of foreign nationalities will be in attendance
 - C. The professed motive or reason for the event
 - D. The religious or political affiliations of the event participants

Use of Force Policy p 4 B

4. According to the Champaign Police Department General Order regarding use of force, all use of force must be preceded by a verbal warning.
- A. True
 - B. False

**City of Champaign, Illinois Police Department
Assessor Rating Guidelines**



**Oral Interview Phase for the
Lieutenant Promotional Process**

Developed by



2008

From: RT Finney
To: Baltzell, Dennis; Clark, Jim; Coon, Geoffrey; Crane, Matthew; Frost,...
CC: Daniels, Troy; Murphy, John; Nearing, Holly
Date: 4/26/2011 4:29 PM
Subject: Re: Lieutenant Promotional Exam Change

I have been notified that fifteen Sergeants have signed up to take the Lieutenant Exam. I want to congratulate each of you on your initiative and desire to become the future leaders of the Champaign Police Department. The transition from Sergeant to Lieutenant is a substantial step in your career and will require the ability to transform conceptual policies into working practices. This ability will require an you to work within a structured environment and yet be opened minded enough to adapt to changing organizational and community needs. As a Police Chief, the Lieutenant position not only provides me with accurate information about personnel and community needs, but also establishes a line of trust with the Chief and Deputy Chief's to ensure that information flows accurately both up and down the ranks within the Department. The Lieutenant is the first line of management supervision between the Chief and the rank and file. I will look to you to mediate complex problems within the Department and the community, regardless of the issues, and to provide me with recommendations and counsel regarding those solutions. In other words, communication and trust is the key to resolving every organizational and community issue. I want to wish each of you good luck on your testing and I look forward to working with you in the future.

R.T. Finney
Chief of Police
City of Champaign
82 E. University Avenue
Champaign, Illinois 61820
217.403.6907
rt.finney@ci.champaign.il.us

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>>> Lori Bluhm 4/25/2011 12:17 PM >>>

To: Registered Candidates for the Police Lt. Promotional Exam

Please be advised that the reading list for the Police Lieutenant promotional exam is changed, effective immediately (per the attached memo from Stanard & Company, test administrators). After further review and consideration of content, the book "Crime and Everyday Life" has been eliminated and replaced by a study from the Department of Justice, titled: Crime Analysis for Problem Solvers: In 60 Small Steps (COPS, U.S. Department of Justice) by Ronald V. Clarke and John E. Eck. You can obtain this new material free of charge at the following web address or by contacting the HR Office to request a printed copy:

<http://www.cops.usdoj.gov/files/RIC/Publications/CrimeAnalysis60Steps.pdf>

Due to the change in reading material, the 10-week study period will be re-set to begin today. A new date for the written exam will therefore be established. The dates of July 6th, 7th or 8th are under consideration. Please contact me by email or phone (x8770) no later than Thursday, April 28, if you have an unavoidable conflict with any of those three dates.

Additional information regarding the Lt. Promotional Process will be finalized and shared with you in the next several

From: Steve Carter
To: RT Finney
CC: Chris Bezruki; Dorothy David
Date: 6/9/2011 3:23 PM
Subject: Re: Lieutenant's Up Grade

I think that would be very desirable.

Steve Carter
City Manager
steve.carter@ci.champaign.il.us
217-403-8710

>>> RT Finney 6/9/2011 3:13 PM >>>

In the event of Lt. Swan's departure, and because the promotional exams are occurring, I have discussed with Chris not immediately filling this position until after the promotional exam. This will cause an absence of approximately 6 weeks, but we can cover it with current Lieutenants and the Deputy Chief.

R.T. Finney
Chief of Police
City of Champaign
82 E. University Avenue
Champaign, Illinois 61820
217.403.6907
rt.finney@ci.champaign.il.us

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From: Chris Bezruki
To: RT Finney
Date: 6/9/2011 8:56 AM
Subject: Re: Lieutenant Upgrades

Swan wants to leave.

M. Chris Bezruki
Human Resources Director
102 North Neil Street
Champaign IL 61820
217.403.8776 Fax 217.403.8780
Chris.Bezruki@ci.champaign.il.us

>>> RT Finney 6/9/11 8:06 AM >>>
What Lt. Upgrade?

R.T. Finney
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>>> Chris Bezruki 6/8/2011 3:31 PM >>>

M. Chris Bezruki
Director of Personnel Services
102 North Neil Street
Champaign IL 61820
217.403.8776 Fax 217.403.8780
m.bezruki@ci.champaign.il.us

From: RT Finney
To: Baltzell, Dennis; Clark, Jim; Coon, Geoffrey; Crane, Matthew; Frost,...
CC: Daniels, Troy; Murphy, John; Nearing, Holly
Date: 4/26/2011 4:29 PM
Subject: Re: Lieutenant Promotional Exam Change

I have been notified that fifteen Sergeants have signed up to take the Lieutenant Exam. I want to congratulate each of you on your initiative and desire to become the future leaders of the Champaign Police Department. The transition from Sergeant to Lieutenant is a substantial step in your career and will require the ability to transform conceptual policies into working practices. This ability will require an you to work within a structured environment and yet be opened minded enough to adapt to changing organizational and community needs. As a Police Chief, the Lieutenant position not only provides me with accurate information about personnel and community needs, but also establishes a line of trust with the Chief and Deputy Chief's to ensure that information flows accurately both up and down the ranks within the Department. The Lieutenant is the first line of management supervision between the Chief and the rank and file. I will look to you to mediate complex problems within the Department and the community, regardless of the issues, and to provide me with recommendations and counsel regarding those solutions. In other words, communication and trust is the key to resolving every organizational and community issue. I want to wish each of you good luck on your testing and I look forward to working with you in the future.

R.T. Finney
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>>> Lori Bluhm 4/25/2011 12:17 PM >>>

To: Registered Candidates for the Police Lt. Promotional Exam

Please be advised that the reading list for the Police Lieutenant promotional exam is changed, effective immediately (per the attached memo from Stanard & Company, test administrators). After further review and consideration of content, the book "Crime and Everyday Life" has been eliminated and replaced by a study from the Department of Justice, titled: Crime Analysis for Problem Solvers: In 60 Small Steps (COPS, U.S. Department of Justice) by Ronald V. Clarke and John E. Eck. You can obtain this new material free of charge at the following web address or by contacting the HR Office to request a printed copy:

<http://www.cops.usdoj.gov/files/RIC/Publications/CrimeAnalysis60Steps.pdf>

Due to the change in reading material, the 10-week study period will be re-set to begin today. A new date for the written exam will therefore be established. The dates of July 6th, 7th or 8th are under consideration. Please contact me by email or phone (x8770) no later than Thursday, April 28, if you have an unavoidable conflict with any of those three dates.

Additional information regarding the Lt. Promotional Process will be finalized and shared with you in the next several

From: RT Finney
To: Bluhm, Lori
CC: Carter, Steve
Date: 4/21/2011 9:43 AM
Subject: Re: Lt. Promotional Process

Lori;

Please coordinate with just me regarding future decisions on this promotional exam. Thank you.

R.T. Finney
Chief of Police
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>>> Lori Bluhm 4/12/2011 3:55 PM >>>

The process to establish the next Police Lieutenant Promotional List is in progress. Please register to participate in the testing by signing-up in the Human Resources Office by 4:00 p.m. on Friday, April 22, 2011 (City Building, 4th floor). You will receive a study guide for the written exam when you register. The Human Resources Office is open from 7:30 a.m. to 5:00 p.m., Monday through Friday (if you arrive prior to 8:00 a.m., please call the HR Office at 403-8770 for admittance to the locked City Building).

The tentative date for the Police Lieutenant Written Exam is Tuesday, June 21, 2011 at 1:00 p.m. in the Police Multipurpose Training Room, subject to approval by the Board of Police and Fire Commissioners at their April meeting. Please allow approximately 2 hours to take the exam. The exam will be prepared by Stanard & Associates, Inc., a consulting firm specializing in the creation and implementation of public safety testing. Stanard will not release the exam questions to the City prior to administration of the exam. Exam scores will not be released until all steps of the promotional process have been completed.

Dates for oral interviews are under consideration, and will be provided when finalized. Further details will be announced at a later date.

Please contact me with any questions about this process.

Lori Bluhm
Asst. HR Director
City of Champaign
(217) 403.8770

From: RT Finney
To: Bezruki, Chris
Date: 3/16/2011 8:07 AM
Subject: Promotional Exam

Chris;

The Lieutenants test is about to expire on June 27, 2011. As you know these tests are very expensive. The most recent test has never been used to pick a candidate, however, with the VSIP it appears that there may be one or two Lieutenants leave within days or weeks after the test expires. Is there a provision for extending the use of the current test, possibly for 6 months or a year. We are assured to get some value from both the old and the new one in that time period. Any thoughts?

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REPORT TO CITY COUNCIL

FROM: Steven C. Carter, City Manager

DATE: October 14, 2011

SUBJECT: 2008 and 2011 Police Lieutenant Eligibility Lists --INFORMATION ONLY

A. Introduction: The purpose of this report is to provide an explanation of the steps followed to establish the 2008-2011 and 2011-2014 Police Lieutenant Promotional Eligibility Lists.

B. Action Requested: This report is for information only. Council questions are welcome.

C. Prior Council Action: The Board of Fire and Police Commissioners was created by the City Council to conduct examinations and prepare eligibility lists for the appointment of firefighters and police officers and for promotion in the Champaign Fire and Police Departments.

D. Background. Promotion to Police Lieutenant, as required by applicable law and City code, is made from an eligibility list. The Board of Fire and Police Commissioners (Board) is responsible for the creation of eligibility lists for promotional appointments, in accordance with Board rules. The Human Resources Department serves as staff support to the Board.

Police at the rank of Sergeant, whom have completed probation in their current rank, are eligible to participate in the Lieutenant promotional process. A Police Lieutenant Eligibility List is in force for three years, with promotions occurring as vacancies become available at the rank of Lieutenant. The most recent eligibility list expired on June 27, 2011; the process to establish a new list began in April 2011. The prior list had expired on June 27, 2008; the process to replace that eligibility list began in October 2007. Attached to this memo are reports which describe the 2011 and 2008 eligibility list processes.

E. Community Input: The Board of Fire and Police Commissioners have adopted rules which govern the Police Lieutenant Promotional process. The Board authorized changes to the process for 2011, enhancing fairness. The Board certified the 2008-2011 and 2011-2014 Police Lieutenant Eligibility Lists.

Prepared by:



Lori Bluhm
Assistant Human Resources Director

Reviewed by:



Chris Bezruki
Director of Human Resources

Attachments:

Exhibit 1: 2011 Police Lieutenant Eligibility List Process

Exhibit 2: 2011 Supplemental Facts

Exhibit 3: 2008 Police Lieutenant Eligibility List Process

Exhibit 4: 2008 Supplemental Facts

Exhibit 1: 2011 Police Lieutenant Eligibility List Process

A. Summary: The City utilized a standard, structured process for development of the 2011-2014 Police Lieutenant Eligibility List. In conjunction with the Board of Fire and Police Commissioners, the City reviewed components of the process and made adjustments to enhance fairness and impartiality.

- The City follows practices common among municipalities to develop a promotional eligibility list. Development of a promotional list is subject to Board of Fire and Police Commission rules. These rules were adhered to for the 2011-2014 eligibility list.
- The City contracted with Stanard and Associates, a Chicago-based, professional public-safety testing company for administration of testing processes. Stanard has 30 years of experience with more than 2,000 public safety agencies in the administration of promotional exams. Stanard advised the City of best practices in fair and secure testing.
- Some questions were raised at the beginning of the 2011 process regarding fairness, impartiality and scoring practices. The City took additional measures to insure a fair and secure promotional testing process. Such measures include: candidate orientation to explain the process and scoring methods, development of new written examination and oral examination questions, scores of individual components held confidential by Stanard until completion of process, expansion of interview panels to include external law enforcement experts and community members, and exclusion of Champaign Police Department staff from interview panels to address perceptions of favoritism. Additional changes were also made to department rating components to enhance consistency and fairness.

B. Background: The City (like most other municipalities) follows an examination process to establish the Lieutenant Eligibility List. The examination process includes three components: a written examination, an oral examination, and department ratings. Scoring methods and instruments for departmental merit ratings must be approved by the Board. The Board rules require that a reading list is prepared and posted to assist in preparation for the written exam no later than ten (10) weeks prior to the test.

Each component of the process is separate and distinct from the others. Upon completion of the examinations, to which points or percentages are assigned, the Board generates and certifies a list of eligible candidates in rank order with the highest total score appearing first. Scores are calculated as follows:

Written Exam	33.33% of Composite Score
Oral Examination	33.33% of Composite Score
Department Merit Ratings	33.33% of Composite Score

1. **Utilization of a Professional Testing Company.** The City contracts with a professional, Chicago-based testing company, Stanard and Associates (Stanard), to administer promotional testing exams (written and oral). Stanard is very experienced in providing promotional public safety testing processes, having developed and administered exams for municipal police departments throughout the United States for over 30 years. The City relies on Stanard's expertise and knowledge of best practices in secure and fair promotional testing.
2. **Questions Raised.** As the City began the process of establishing a new Police Lieutenant list in April 2011, questions were raised by some Police Sergeants that were eligible to participate. The employees stated concerns regarding the administration of the previous Police Lieutenant Eligibility List process. In particular, fairness issues and opportunities for more communication and explanation of testing methods/scoring were cited. The City Manager directed the Human Resources Department (HR) to insure a fair and open process for establishing the 2011-2014 eligibility list.
3. **Process Improvements.** The Human Resources Department directed the development and administration of the 2011-2014 eligibility list process and served as the primary point of contact for candidates. A number of measures were taken to insure fairness at each step of the process and to apply best practices as recommended by the professional testing company.
 - A study guide, prepared by Stanard, was provided to each candidate.
 - Candidates were extended a ten (10) week study period to prepare for the written exam.
 - A candidate orientation session was held, providing candidates with a comprehensive overview of the eligibility list process, exam components, scoring methods, test taking tips and strategies, examples of test question format, and recommendations for oral interview preparation. This was the first time the City has provided a candidate orientation session for a promotional test.
 - A training session was held with Police staff responsible for completing the department rating evaluations.
 - Exam and interview questions were kept confidential by a professional testing company.
 - Oral Interview Panels were expanded to include external law enforcement experts and community members with interviewing expertise.
4. **Written Examination.** The goal of a promotional testing process is to identify the most qualified people available from the existing pool of candidates. One measure of "qualified" is the extent of knowledge an individual has with regard to certain critical topic areas, such as those located in the Department's Policy and Procedures Manual. A written test is one of the best ways to measure this knowledge. Due to the time and expense involved in developing a written exam, agencies often use the same exam more than once, or re-use questions from prior exams. For the 2011 Lieutenant promotional process, the City directed Stanard to develop a new written exam; new source material was identified and no previously used questions were included in the exam.

- a. **Source Materials.** Stanard facilitated the process of identifying source materials for the new written exam. Focus was placed on identifying critical areas of knowledge necessary for the job. Stanard held a meeting with HR Staff and Police Command Staff to review possible sources, based on their experience with other agencies and their knowledge of contemporary trends in management/leadership and police practices. Stanard stressed that the most important criteria for selecting sources is relevance to the job and to the mission and philosophies of the department.

Intelligence Led Policing is a significant philosophy for the Police Department, and Lieutenant candidates should demonstrate understanding of the topic. A book by Dr. Rachel Boba titled "Crime and Everyday Life" was selected to cover this topic. However, upon further review, this book was found to not adequately cover the mechanics of Intelligence Led Policing. This, combined with the fact that an eligible candidate had received training directly from the author regarding Intelligence Led Policing, although not necessarily on the content of this particular book, lead to the decision to remove the book as source material. It was replaced by a U.S. Department of Justice Study that more adequately covered the relevant topic.

The final list of source material for the written exam was as follows:

- The Future of Management by Gary Hamel
- Deadly Force Encounters by Alexis Artwohl
- Crime Analysis for Problem Solvers: In 60 Small Steps (COPS, U.S. Department of Justice) by Ronald V. Clarke and John E. Eck
- Police Department Policies and Procedures
- City Policies

- b. **Written Exam Procedures Made More Secure.** The City took additional steps to insure the confidentiality and security of the 2011 written exam. Using the source materials, Stanard's expert test writers independently developed questions for the written exam. Stanard typically meets with City subject matter experts (Police Command Staff) to review the written exam questions prior to the test. This occurs to insure the relevance and appropriateness of the test items and answers. However, for the 2011 test, this review took place at the same time the exam was administered to the candidates, to eliminate any perception that City staff could have access to test questions unfairly. Questions that required changes were noted by Stanard, and candidate answers were scored according to the adjusted answer key. For instance, one multiple choice question was found to have two possible "correct" answers based on Department practice; candidates were therefore given credit for either of the identified "correct" answer choices.

Additionally, Stanard typically sends to the City results from the written exam immediately after scoring. For the 2011 process, the City directed Stanard to withhold the exam results from disclosure until the entire promotional process was completed. Stanard complied with this request and did not release written exam results to the City prior to completion of all process components.

5. **Oral Examination.** Stanard also developed and administered the oral exam. This is a structured interview, with pre-defined anchor answers for each question. Behavioral and situational questions are included. The interviews are conducted by panels. The same questions are asked of each candidate. Candidate responses are scored on a scale of one (1) to ten (10), based on the number of elements of the pre-defined answer covered in the response. Each panelist individually scores each candidate response. Panelists then discuss their scores and strive to achieve agreement (within two points).
- a. **Questions Kept Secure.** As with the written exam, Stanard routinely consults with City Police Department subject matter experts to develop and review the oral interview questions. However, for the 2011 process, the City made the following changes:
- Stanard interviewed the Police Chief regarding major themes and policies of importance to the Department and to the rank of Lieutenant.
 - Stanard independently developed the oral interview questions, without disclosing the questions to the City prior to administration of the oral interviews.
- b. **Interview Panels Expanded.** The City generally utilizes three (3) panelists for the oral interview, comprised of members of the Board of Fire and Police Commissioners and/or Champaign Police Department Command staff. For 2011, two interview panels were used (in part because of a higher number of candidates than usual and to complete all interviews on the same day, eliminating opportunity for interview questions to be shared among candidates). Each candidate interviewed with only one panel (15 candidates participated; one panel interviewed eight (8) candidates, with the other panel interviewing seven (7) candidates). Each panel had five (5) members. Panel members included: a Board of Fire and Police Commissioner, City HR Director and Assistant HR Director, regional experts in law enforcement and public safety (at the Chief or Deputy Chief level), and Champaign citizen representatives with HR expertise and interviewing experience. Champaign Police Department staff did not serve on the interview panels.
- c. **Candidate Staging.** Based on Stanard's recommendations regarding best practices, candidates reported to a central location on the date of the oral interviews. Candidates randomly selected pre-printed tickets with assignment to an interview panel and time. Candidates were required to remain in the central location, with no electronic devices allowed, until their assigned interview.
6. **Department Ratings.** Department Ratings are a subjective evaluation of each candidate's potential for the next rank. The overall Department Rating score for 2011 was calculated as follows:
- Police Chief Rating (1/3 of Department Rating Overall)
 - Deputy Chief Rating (1/3 of Department Rating Overall). Each of three (3) Deputy Chiefs rate each candidate individually. Scores are averaged.
 - Lieutenant's Rating (1/3 of Department Rating Overall). Each of four (4) Lieutenants rate each candidate individually. Scores are averaged.

Ten (10) performance dimensions are evaluated individually with a score of Excellent (10 pts), Good (7 pts) or Fair (5 pts). Many factors tend to make departmental ratings a difficult task, such as closeness to the employee, varying degrees of experience working directly with the employee and efforts to maintain high morale. General procedures and guidelines were provided, so that all raters would approach the task in a standard fashion.

- a. **Rating Categories.** The Board authorized a reduction in the number of Department rating categories for 2011 (two categories were combined for a total of 10 rather than 12 categories. This change simplified the scoring procedure, reducing the maximum possible score from 120 to 100. The categories were as follows:
- Citizen Responsiveness and Community Oriented Policing
 - Reliability
 - Integrity
 - Communication Skills
 - Respect
 - Job Knowledge
 - Decision Making and Problem Solving
 - Discretion
 - Objectivity
 - Leadership
- b. **Evaluation Rating Replaced.** The 2008 Lieutenant Eligibility List process included a Performance Evaluation score in the Department Rating component. A candidate's most recent three (3) years of performance evaluations were assigned a score, which became 1/3 of the Department Rating score. Since candidate performance evaluation categories vary in number and type based on a candidate's work assignments (for instance, more categories are evaluated if the candidate is a SWAT team member or a Field Training Officer), it could be difficult for candidates to understand and support the scoring process. Although the scoring methods took this into account and fairly converted all candidates' evaluation scores to a 100% scale, it was a complex process. Additionally, one 2011 promotional candidate did not receive the standard Police evaluation for the most recent two (2) years, due to a position upgrade.

For the reasons indicated above, the Department Rating process was revised. Department Ratings included a rating performed by Police Lieutenants, replacing the performance evaluation rating. Lieutenants utilized the same rating form used by the Chief and Deputy Chiefs. All raters were provided with the most recent three (3) years of performance evaluations, for reference in scoring.

- c. **Review of Scores.** In order to provide transparency and allow candidates to understand Department Ratings and receive guidance for areas of improvement, candidates are allowed to review their individual department rating scores. Candidates are also allowed to discuss such scores with the raters.

Exhibit 2: 2011 Lt. Promotional Process -- Supplemental Facts

This timeline includes additional information regarding recent questions on steps of the 2011 Lt. eligibility list process, as a supplement to the summary report. All dates are in 2011. Additional documentation of various steps, communication and information is also available.

- March 2011 Meeting w/Police Sergeants and City Manager, Asst. City Manager and Asst. HR Director. Employees requested information regarding the Lt. promotional process, including an explanation of components of the standard process and scoring methods, which had not been well understood in the past. Specific questions were asked regarding scoring procedures for the department rating component, as well as the use of performance evaluation scores. Concerns were expressed regarding fairness and impartiality of the 2008 eligibility list process.
- March 30 Meeting with Lory Special/Stanard, DC Daniels, DC Murphy, DC Nearing, Bluhm and Bezruki to establish reading list for written exam, focusing on management/leadership and Intelligence Led Policing (ILP). "Crime and Everyday Life", co-authored by Rachel Boba was also discussed as a source for ILP. Prior to arrival of DC Murphy and DC Daniels, review of books began, with discussion that one potential candidate was trained by Dr. Boba (author). Stanard recalls that DC Nearing stated that this candidate was not expected to take the Lt. test. Special advised that utilizing the book could be a concern if the candidate tested, but the book could be allowed if relevant to key department philosophies. Selected sources from this meeting were: 1) The Future of Management by Gary Hamel, 2) Crime and Everyday Life by Marcus Felson and Rachel Boba, 3) Deadly Force Encounters by Alexis Artwohl 4) All Police Department Policies with City Values and City Gift Ban Policy.
- March 30 DC Nearing notified all Police Sergeants of the reading list for the written exam.
- April 12 Bluhm notified candidates of registration deadline (April 22, 2011) to participate in the Lt. Promotional Eligibility List. Tentative written exam date set for June 21, 2011. A study guide, prepared by Stanard, was given to each candidate upon registration.

- April 21-25 Candidate trained by Dr. Boba registered for test; Special was asked if this raised a fairness concern. Special said test questions would be based on material in the sources. Regardless of past experience, all candidates would have equal access to the study material. Special said the book could be included or excluded. Bluhm reviewed the source material question w/Chief Finney. He stated that he would review the book and subsequently told Bluhm that his opinion was that it was about the mechanics of crime, and that it primarily discussed crime and disorder, more than ILP. Stanard provided additional ILP sources. The Chief reviewed these and stated they did not adequately cover the topic. He emailed support for removing the book, suggesting that the sources be reduced to the two remaining books. Stanard said that 2 sources would not be sufficient. Chief Finney emailed an alternative; "Crime Analysis for Problem Solvers". Bluhm communicated the information to Stanard. The Dr. Boba book was replaced with the source recommended by the Chief. The candidate reading list was revised, and the 10 week study period was reset.
- April 23 Bluhm emailed Stanard and asked for candidate scores to be held by Stanard until all components were complete.
- May 4 Meeting with HR Director, Asst. HR Director, City Manager and Asst. City Manager for update on promotional process; discussed oral interview process.
- May 5 Meeting with Chief Finney and Bluhm to discuss oral interview process; agreed on use of external assessors.
- May 9 Bluhm emailed candidates a tentative written exam date of July 8.
- May 10 Grievance filed by a group of Sergeants (candidates and non-candidates) regarding changes to the promotional process. The grievance was denied, because the Lieutenant promotional process is not subject to the labor contract. A meeting was scheduled for June 16 to discuss concerns of all Sergeants.
- May 10 Bluhm emailed Special with process components, asked Stanard to independently develop oral interview questions, and requested recommendations for law enforcement experts to serve as interview panelists.
- May 13 Bluhm emailed candidates an invitation to orientation session on May 23.
- May 18 Meeting with Chief Finney and Bluhm to discuss department rating form, scoring and process.
- May 23
- Meeting with Chief Finney, Lory Special and Bluhm to identify major themes for oral interview questions.
 - Candidate Orientation session (delivered by Special of Stanard) to explain all components of the promotional process and scoring methods.

- Board certified test process, including changes to department ratings (as described in draft RTC). Changes proposed to address candidate concerns regarding fairness, in that number of rating categories changes based on job assignment. Also, one candidate received NBU evaluation rather than Police eval for past 2 years, complicating the prior practice of including 3 years of performance evaluation scores as 1/3 of the Department Rating.
- May 26 Chief Finney invited law enforcement experts to serve as oral exam panelists; forwarded confirmations to Bluhm for follow-up.
- June 16
- Department Rating training provided to Raters (DC Murphy absent).
 - Meeting with City Manager Carter, Chief Finney, Bezruki, Bluhm and Sergeants regarding issues in grievance. Carter invited open dialog to discuss any concerns regarding the promotional process and/or communication. Carter stated that ideally communication would occur through the department chain of command, recognizing that some situations warrant other methods of communication with City administration. Candidates asked for explanation of a change to the reading list which replaced the book by Dr. Boba with a Department of Justice Study. Bluhm stated that the reading list was changed to avoid perceptions of unfairness. Candidates asked who would be involved in development of oral interview questions. Sergeants asked for confirmation that a Lt. would be selected from the top 3 on final list; Chief Finney responded that the Board rules don't require this and the final selection decision would be at his discretion. Note: At a later date, it was discovered that a police department policy required promotion from among the top 3 on the final list; candidates were then advised of this procedure by HR.
 - Candidate Clark emailed Bluhm and requested a copy of the Board rules and other policies regarding Lt. selection. Clark rescinded his request the following day, stating that he already received the requested information.
- June 20 Bluhm emailed prior 3 years of candidate performance evaluations to Raters, for their use in completing department rating forms.
- June 27 Bluhm emailed candidates info re: Department Ratings due date (June 30), written exam date of July 8, and oral exam date of July 20.
- July 8 Written Exam
- July 8 Chief and DCs, HR Director reviewed written exam questions with Stanard.
- July 12 Special and Nearing determined responses to written exam challenges.
- July 12 Candidate Frost requested oral interview prep information from Bluhm. Bluhm responded by emailing all candidates a statement from Stanard.

- July 12 (Date approximate). Lt. Paulus mentioned to Bluhm that candidates have asked questions regarding the role of community presentations in the eligibility list process. Bluhm was unaware of a community presentation element. Bluhm sought direction from Bezruki, who then discussed with Chief Finney. It was understood that the Chief's intent was to consider the presentations in his promotion decision, following establishment of the eligibility list.
- July 13 Candidate Walker requested from Bluhm a copy of information presented in orientation. Bluhm responded by emailing all candidates the orientation presentation.
- July 19 Bluhm and Bezruki reviewed Department Rating results with the City Manager
- July 19 Bluhm and Bezruki learned of Police Department Policy 34.1, which specifies that Lt. promotion will be from the top 3 names on the eligibility list.
- July 20 Assessor training and Oral Exam/Interviews.
- July 20 Candidates were sequestered in one room while waiting their turn for the oral exam. An HR staff person proctored the room, noting observations. The notes indicate some possible concerns regarding candidates communicating with each other following one of their oral interviews.
- August 4 Meeting with Chief Finney, HR Director and Asst. HR Director regarding process for posting of candidate scores.
- August 8 HR Director and Asst. HR Director met with the City Manager and Police Chief to discuss final Lt. selection process. Tentative Eligibility list is reviewed.
Bluhm emailed tentative eligibility list to candidates (overall total scores).
- August 17 Bluhm emailed complete tentative eligibility list to candidates (with component scores).
- August 19 Bluhm emailed candidates instructions for submitting questions regarding final scores and/or department rating scores.
- August 22 BFPC certified Lt. eligibility list.

Note: Throughout the Lt. promotional process, candidates communicated with HR staff. Candidates asked questions regarding the process and/or raised concerns of retaliation and fairness. Additionally, Rater Swenson and Bluhm had an informal discussion regarding Department ratings. Candidates submitted questions regarding department rating scores in August and September. Resolution of those questions is still pending at the time of this report. One candidate filed a grievance stating that "the testing and evaluation processes for promotion to Lt were conducted unfairly and in an inequitable manner in violation of the parties' collective bargaining agreement." Resolution of the grievance is pending.

Exhibit 3: 2008 Police Lieutenant Promotional Process

- A. Introduction.** This report provides information regarding the 2008 Police Lieutenant Promotional Process. The report is based on facts from email and written documents archived by the City of Champaign Human Resources Department and Stanard & Associates (testing vendor), and on statements from Stanard regarding the elements of the promotional process in which they were involved. Attached is a chronological list of correspondence and events associated with the 2008 Lt. Eligibility List process, which provides more detail. Some individuals involved in the process are no longer employed with the City or Stanard & Associates, which could cause some information to be unavailable.
- B. Background.** The first step of a typical promotional process is a written examination. Typically, City Police Department representatives review and select source materials (books, City/Department policy/procedure), from which written exam questions are composed by a testing company. A study guide is also developed by the testing company and distributed to the candidates. A 10 week study period is then required by the Board of Fire and Police Commission rules. The City's typical practice includes an on-site visit from Stanard & Associates to review proposed written test questions with a team of City representatives (HR staff, Board members and/or Police Department subject-matter experts). The testing company also develops an oral exam, including an on-site visit to review proposed questions with the Board and/or City and Police Department staff. The Board and Police Department personnel, City and/or Police Department personnel and/external law enforcement personnel serve as interview panelists for the oral exam. Departmental ratings are collected and compiled, using a variety of methods to arrive at a departmental rating score. Finally, a ranked eligibility list is established based on the results of all rated components of the process.
1. **Primary Participants in the 2008 Promotional Process.** The process to establish the 2008-2011 Lt. Promotional Eligibility List was initiated in October 2007. Records show Lt. Scott Swan as the initial point of contact representing the Police Department. Records also show that this responsibility later shifted to Chief R.T. Finney, at his request. The City contracted with Stanard & Associates to develop written and oral exams, with Heather Leffler acting as Stanard's representative to the City. Kathy Coffey, HR Secretary, assisted to facilitate the timeline, communicate with candidates and the Board of Fire and Police Commissioners ("the Board"), and to coordinate various details throughout the process. The Board of Fire and Police Commissioners (Board) approved components of the process in conjunction with Board rules and served, along with Police Department staff, as interview panelists.

2. **Development of 2008 Written Exam.** Stanard states that the 2008 Lt. exam was based in part on the 2005 Lt. exam, with the difference being 47 new replacement questions, plus 11 additional items re-written at the request of Lt. Swan. Therefore, 58 new questions were written for the 2008 exam and 42 were reused from 2005, for a grand total of 100 questions. The 2005 exam was based off of the 2001 exam, with a total of 34 questions replaced from 2001 to 2005 (14 City policy questions were updated and a new source book was added from which 20 questions were written in 2005).

Stanard's records show that Leffler worked directly with Lt. Swan regarding the development of the Lt. written exam beginning in October 2007 and continuing through at least March 2008. Lt. Swan reviewed the reading list of source materials for the written exam and directed Leffler regarding changes to that list and the associated study guide. The City's two most recent Lt. promotional exams had occurred in 2001 and 2005. The source materials (4 books) for the 2005 exam included three books that were used in 2001, and the addition of one new book (Effective Police Supervision). Two of these same sources were again used for the 2008 exam (a third was replaced with a more current edition and one was eliminated). Updated City policies were also used as source material for the 2008 exam. Email records show that Lt. Swan worked with Leffler to finalize the list of sources, determine the percentage of exam questions to be taken from each source, distribute a study guide to candidates and to review/revise written exam questions.

3. **Revisions to 2008 Proposed Written Examination:** Email correspondence documents the following information: Lt. Swan received the first draft of the 2008 written exam questions and answers via email from Leffler on March 4, 2008. Lt. Swan reviewed the exam and responded to Leffler on March 11 with a request for specific questions to be revised/replaced. Eleven questions were re-written per Lt. Swan's request. Stanard states that the final exam, incorporating Lt. Swan's revisions, was sent to Chief Finney (hard copy mailed by Leffler, no email copy, no copy to Lt. Swan) for final approval. Stanard states that it does not appear that any additional changes were made to the exam after Lt. Swan's changes were. Stanard's records indicate that an on-site review of the exam with a team of City staff and Board members did not occur for the 2008 written exam.

A February 5, 2008 email from Chief Finney to HR Director Chris Bezruki requested that Coffey communicate with the Chief rather than Lt. Swan regarding the Lt. promotional process, to "alleviate some of the rumors." He also asks that this request be treated as confidential. There is no record found indicating that similar direction was given to the testing company, and Lt. Swan continued to communicate with Stanard & Associates in March. On May 1, Leffler sent an email to Chief Finney, referencing a previous conversation. Leffler's email forwarded the exam changes that had been requested by Lt. Swan. She indicated that she had addressed issues of test security with Lt. Swan, but

offered options to the Chief in the case of a concern that test security had been breached, including the option of recreating/altering the written exam. She also requested that Chief Finney notify her in writing that he, and only he, would be the project contact for the promotional process. Email records show that on May 6 Chief Finney responded, advising Leffler to that he would be the point of contact. Leffler then sent the written exam questions and answers to Chief Finney.

4. **Written Exam Administration.** The 2008 Lt. written examination was administered by Leffler on May 20, 2008. A total of eight (8) candidates participated in the exam. Five (5) of these candidates (Clark, Griffet, Myers, Shaffer, Walker) had previously tested in 2005, including two (2) candidates that also tested in 2001 (Clark, Walker). Per Stanard & Associates, more than half of the written exam items had been replaced from the 2001 exam to the 2008 exam.
5. **Written Exam Results.** Exam results were emailed to Chief Finney and Kathy Coffey by Leffler on May 22. The highest overall score on the written exam was 98 (this score was comprised of scores of 100% in three subject areas, and a 92% in the fourth subject area). The next highest overall score was 78. One hour after receipt of the exam scores, Chief Finney inquired to Leffler via email about the frequency of a candidate scoring 100% in three subject areas. Leffler responded that “typically, candidate scores fall somewhere between 65 to 85 on our promotional exams. It’s rare to see a candidate score higher than a 95 on our exams (including individual source areas).” Leffler continued to explain that the City’s 2001 Lt. test scores ranged from 58 to 86, and the 2005 test scores ranged from 59 to 76. Additional correspondence from Stanard states “Needless to say, based on our experience and the former passing scores for Champaign, a score of 98 on a written exam is not a common occurrence we encounter on custom law enforcement promotional exams”. Additionally, 1999 scores ranged from 62 to 97, and 1996 scores ranged from 58 to 91.

On May 30, Coffey sent each candidate a letter announcing their individual written exam results.

6. **Oral Examination Development and Administration.** The second step of the Lt. Eligibility List process is an oral examination. The City contracted with Stanard & Associates to develop the oral exam component. Coffey and Lt. Swan began email conversation (March 2008) re: dates for the oral examination. On March 20, Chief Finney notified Coffey and Swan that he (Chief) would work with Coffey and the Board to finalize dates for the oral exam rather than Lt. Swan. Coffey notified Leffler in December 2007 that Chief Finney would like new oral exam questions to be developed for the 2008 process, rather than reusing prior questions. Coffey scheduled an April 18 appointment with Leffler and Board members to discuss oral exam questions/answers. Email shows that Chief Finney confirmed that he would participate in this meeting and bring input from his staff. All materials, including oral exam questions/answers, rater

guidelines and forms were mailed by Leffler to Coffey on May 9. Final oral exam questions and answers were sent by Leffler to Chief Finney on May 12.

The City administered the oral exam on June 19, relying on written guidelines provided by Stanard. The oral interview panel consisted of Board members Betsy Hendrick and John Bramfield and CPD staff including Chief R.T. Finney, DC Holly Nearing and Lt. Michael Paulus. Each rater completed an individual score form for each candidate, recording the highlights of the candidates' responses and assigning a score from 1 to 10. The City (records are not clear regarding who at the City specifically did this) self-scored the final results of the oral exam process, rather than Stanard processing the scores.

7. **Departmental Ratings.** The 2008 Department Rating component was comprised of the following:

Rating by Police Chief:	1/3 of Department Rating Score
Average of Ratings by Deputy Chiefs:	1/3 of Department Rating Score
3 year average of performance evaluation scores:	1/3 of Department Rating Score

In January 2008, Coffey provided Swan with the standard Department Merit Rating Form and requested review prior to forwarding to the Board. The Board approved the form (no revisions were requested) at its February 2008 meeting. Department Merit Rating forms were completed by Chief Finney and the three Deputy Chiefs on June 19 and June 20.

8. **Final 2008-2011 Eligibility List.** The Board approved the 2008-2011 Lt. Eligibility List on June 23. The 2005-2008 Lt. Promotional Eligibility List expired on June 27, 2008.

Exhibit 4: 2008 Chronological Timeline

October 2007:

- Kathy Coffey initiates planning process for Police Lieutenant's promotional process by emailing Stanard, asking "who will be working with Lt. Scott Swan to develop the reading list for the components of the exam"?
- Heather Leffler is assigned as the contact for Stanard & Associates
- October 23 – Leffler emails Lt. Swan to arrange time to discuss exam/process
- October 31 – Leffler emails Swan a summary of their phone discussion. Confirms that same sources will be used for written exam, except that one book will be removed and exam content will be equally redistributed among remaining 4 sources. One source may be updated to a current edition.
- Stanard offers assistance with the oral exam part of the process, Coffey indicates she will need to work with the Chief and the Board regarding revising interview questions.
- Coffey passes Leffler's information to Lt. Swan, indicates that Leffler will work with him to develop the reading list.

November 2007:

- Swan communicates to Coffey information he discussed with Leffler at Stanard: that the test date will be 5/6 and the sources for the reading list for the exam will be the Department's Policies & Procedures (2007), Peak & Glensor text, Goldstein text, and More et al text.
- Leffler sends Swan a draft study guide for his review and specifically requests any revisions to the Policies & Procedures section so that the test item writers can pull from it. Swan forwards to Coffey indicating he has already gone through the information.

December 2007:

- Study guide is finalized.
- Coffey indicates to Leffler that the Chief would like the board oral exam questions to be revised, not to recycle the old ones. Stanard sends a proposal to do this, Coffey forwards it to Chief Finney.

January 2008:

- Swan, Coffey, and Leffler agree on dates for the exam and oral board interviews (May 6 for exam and May 20 for interviews). They discuss tentatively the idea of meeting with the Board in April to revise interview questions. Swan indicates he will propose this to Chief, Chris, and the Board.
- Coffey and Swan briefly discuss working together to assign Police personnel to the Board panels for interviews.

- Swan asks Coffey (and copies DC Nearing) when he can communicate test dates and study material to the department. Coffey directs him to announce that information now.
- Coffey provides Swan (and copies DC Nearing) the “departmental merit rating form”, the Lieutenant job description, and qualifications and requests review of these items so that they can go in the Board packets for the Board to review, and instructs to be sure to include the Chief in the review of those documents.

February 2008:

- Lt. Swan communicates to the Sergeants group (and copies DC Murphy, Chief Finney, and Coffey) clarifying that a study guide associated with one of the texts on the reading list is not included as part of the source materials for the exam.
- Feb 5 -- Chief Finney requests to Chris Bezruki that Kathy Coffey communicate with him rather than Lt. Swan regarding the Lieutenant’s promotional process, in order to “alleviate some of the rumors”. He also requests that this request be treated as “confidential.” Bezruki replies “OK” and copies Coffey.
- Coffey confirms an appointment with Leffler for 4/18 to meet with the Board to develop interview questions. She advises that the Chief will attend and bring “input from his staff to share”

March 2008:

- Swan contacts Coffey, requesting that she proof a memo that he updated that announces dates of the written and oral exams and requests sign up.
- March 4 – Leffler emails the the 2008 written exam draft to Swan for his review/revision
- March 11 - Swan emails Leffler with requested revisions to the written exam.
- Stanard updates the 2008 draft written exam with 11 revisions as requested by Swan.
- Finney instructs Coffey to revise the date of the oral interviews to sometime after the exam. Coffey forwards this request to Chris Bezruki. Swan contacts Coffey to ask her if the orals date can be rescheduled. Coffey acknowledges that the Board rules require that the orals take place after the written exam. Finney responds to Swan (and copies Coffey and DC Murphy) and indicates that he will work with Coffey to schedule the dates.

April 2008:

- Coffey follows up with Chief Finney (and copies Mary Mullen, the Chief’s Secretary, and Swan) asking about dates for the orals so that she can prepare the memo to interested candidates. Finney replies with a tentative date and advises the Board will decide at the May meeting.
- Coffey sends a memo to all Sergeants (and copies several people at CPD) announcing the dates of the exam and the tentative date for the interviews (“the week of June 16th”),

indicates that the signup sheet will be posted on Lt. Swan's door, and requests written response from candidates interested in taking the exam.

- Yes responses were: Clark, Crane, Griffet, Lack, Rea, Shaffer, Walker, Frost, Myers. "No" responses were Rein, C. Shepard, Friedlein, Ketchem, Schweighart, Oleson, Gallagher, Baltzell, Shelton.

May 2008:

- Leffler at Stanard asks Coffey if she needed to attend the oral interviews, and Coffey confirms that the Board will serve as the interview panel and Leffler did not need to attend. She states that this is how it has been done in the past.
- Finney contacts Leffler and tells her that he should be her department contact for the promotional test, and that HR will be kept in the loop.
- May 1 – Leffler forwards to Chief Finney the email from Lt. Swan which contained Swan's requested revisions to the 2008 written exam. Leffler discusses options if Finney is concerned that test security has been breached, including recreating/altering the exam. Leffler requests written direction for all oral exam and written exam info to go directly to the Chief only. Chief Finney emails this direction on May 6.
- May 6 – A hard copy of the second version of the exam which incorporated the changes based on Lt. Swan's input was mailed (not emailed) to Chief Finney.
- Leffler inquires whether the department is going to score the interviews.
- Sgt. Frost communicates to Lt. Swan that he won't be taking the exam that day.
- May 9 – Leffler emails Finney for permission to send oral exam materials to Coffey. Finney approves, and asks Leffler to also email oral interview questions and answer guidelines to himself. Leffler emails Coffey oral exam materials, including questions, rater guidelines and forms.

May 12 – Leffler emails oral exam questions and answers to Chief Finney.

- Written exam held on May 20th. Eight candidates participate. Five of the eight (Clark, Griffet, Myers, Shaffer, Walker) also took a previous Lt. promotional test in 2005. Two of the eight had additionally taken a Lt. promotional test in 2002 (Walker, Clark) Coffey communicates the date of the oral interviews to Finney (and copies Swan) as June 19th. She indicates that Board Member David Sessions can't participate, and suggests that a Deputy Chief or other "designee of your choice" could fill in for him.
- May 21 -- Sgt. Shaffer asks Coffey if they will receive their exam scores before or after the oral interviews.
- May 21 - Leffler discusses with Chief Finney one written exam question which was challenged by a candidate. Chief Finney affirms Leffler's recommendation for awarding credit. Leffler asks who should receive written exam scores on behalf of the City.

- May 22, results of the written exam are sent from Stanard to Coffey and Chief Finney. Same day, Coffey sends Swan the signup sheet for oral interviews to post, and asks that he fax it back once it's complete.
- Overview results of written exam.
- May 22 – Chief Finney asks Leffler “how often do officers score at 100% in three areas of this exam? Leffler states that “typically, candidate scores fall somewhere between 65 to 85 on our promotional examinations. It's rare to see a candidate score higher than a 95 on our exams (including individual source areas). With that said, I pulled the results of the 2001 and 2005 City of Champaign PD Lt. Promotional Examination results as a comparison and it appears the ranges were 58 to 86, and 59 to 76, respectively.”
- May 30, Coffey sends letters to all test takers (at their home addresses) showing their total score on the exam, with information on the signup sheet for oral interviews.

June 2008:

- Coffey requests the completed sign up sheet from Finney, Finney sends it to her.
- Oral interviews take place on 6/19. Ratings forms completed by: Betsy Hendrick, , John Bramfield, Chief R.T. Finney, DC Holly Nearing, Lt. Michael Paulus
- June 17 – Mike Thomason from Stanard emails Coffey copies of Assessor Rating Guidelines for oral exam (guideline booklets for each rater).
- On 6/19 & 6/20, Departmental Input ratings forms are completed by: Finney, DC Nearing, Daniels, Murphy
- Board approves the eligibility list on 6/23.

July 2008:

- Coffey sends letter to each candidate at their home address documenting their own overall scores on the exam, the oral interviews, and the department ratings.