Department of Justice Tasks / Quarterly Update Report

Task Description
Adherence and application of existing force policies

Task Requirements: PPB shall maintain principles in its existing use of force policies. See Agreement for specific requirements, #66.

Status Complete - review ongoing

Action Steps:
1. Ensure that current and future drafts of the Force Policy adhere to the requirements of this provision.
2. Ensure that training of Force Policy covers the requirements of this provision.

Task Date Completed: 2/18/2013

Evidence of Completion:
1. Directive 1010.00 Use of Force
2. 2013 In Service training materials (located in folder #84)
3. Directive 315.00 Unsatisfactory Performance

Status Note:
2014 Q1 Update: Those principles were maintained in the version of the policy proposed for the 6 month review.
2014 Q2 Update: The force policy revised and adopted in December, 2014 maintained those principles.
2015 Q1 Update: Those force principles remain in the current policy.
2015 Q2 Update: Those force principles remain in effect as the policy did not change this quarter.
2015 Q3 Update: Those force principles remain in effect as the policy was not reviewed nor revised this quarter.
2015 Q4 Update: Those force principles remain in effect as the policy has not been revised this quarter. It was posted for its annual review.
2016 Q1 Update: Those force principles remain in effect as the policy has not been revised this quarter. It remains in Executive Reconciliation.
2016 Q2 Update: Those force principles remain in effect as the Bureau awaits the scheduling of the review of this policy on the directives calendar. It is anticipated that it will be set in the third quarter.
2016 Q3 Update: Those force principles remain in effect. PPB initiated work on extensive revisions to the Bureau’s suite of force directives. It is anticipated that the new force directive (which includes 1010.00, 1020.00, 1030.00, 1040.00, 1050.00, 1051.00 and 940.00) will be submitted for DOJ approval in the fourth quarter of 2016. A two day “summit” to review and discuss the proposed policy was set for Oct. 26-27.
2016 Q4 Update: Those force principles remain in effect. Work has been largely completed on extensive revisions to the Bureau’s suite of force directives. The Bureau met with DOJ and COCL in late October and again in early December for several full days of discussion regarding these directives. The Bureau is awaiting DOJ approval of these directives.
2017 Q1 Update: Those principles remain in effect and are at the center of the newly created force policy. During this quarter, the Policy Team completed the revised draft of the force directives, including 1010.00 – Use of Force and 900.00-General Reporting Guidelines. The complete revamp of 940 and 1010.00 was finished which resulted in the requirements of 940 being subsumed in 1010.00. Thus Directive 940 will be rescinded when 1010.00 is enacted. Discussions continued regarding 1010.10
2017 Q2 Update: Those principles remain in effect and are at the core of the proposed force policy. In the second quarter, PPB completed the revision of Directive 1010.00 and now awaits DOJ approval.
2017 Q3 Update: Those principles remain in effect. In this quarter, PPB received permission from the DOJ to begin training on the new 1010.00 use of force directive which has, at its core, those very principles.
2017 Q4 Update: This quarter the Bureau finished the In-Service training of all sworn members to the new 1010.00 force policy which retains the core principles articulated in this paragraph.

Friday, May 7, 2021
<table>
<thead>
<tr>
<th>Quarter</th>
<th>Update</th>
<th>Text</th>
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</thead>
<tbody>
<tr>
<td>2018 Q1</td>
<td></td>
<td>Those principles remain in effect and are at the core of the force policy (Directive 1010.00).</td>
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<tr>
<td>2018 Q2</td>
<td></td>
<td>Those principles remain in effect and are at the core of the force policy.</td>
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<td>2018 Q3</td>
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<td>Those principles remain in effect and are at the core of the force policy.</td>
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<td>2018 Q4</td>
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<td>Those principles remain in effect and are at the core of the force policy.</td>
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<td>2019 Q1</td>
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<td>Those principles remain in effect and are at the core of the force policy.</td>
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<td>2019 Q4</td>
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<td>Those principles remain in effect and are at the core of the force policy.</td>
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<td>2020 Q1</td>
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<td>Those principles remain in effect and are at the core of the force policy.</td>
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<td>2020 Q2</td>
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<td>Those principles remain in effect and are at the core of the force policy.</td>
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<tr>
<td>2021 Q1</td>
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<td>Those principles remain in effect and are at the core of the force policy.</td>
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<td>2021 Q2</td>
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<td>2021 Q3</td>
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<td>2021 Q4</td>
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<td>2022 Q1</td>
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<td>2022 Q3</td>
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<td>2022 Q4</td>
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Department of Justice Tasks / Quarterly Update Report

Task Description: Use of Force Policy additional requirements

Task Requirements: PPB shall add to its use of force policy and procedures the use of force principles outlined in the Agreement. See Agreement for specifics, #67

Status: Complete - review ongoing

Action Steps:
1. Draft changes to Force Policy that comply with requirements of this provision.
2. Meet with stakeholders, including PPA and DOJ, to review changes and receive input
3. Release draft policy for public comment
4. Incorporate and record feedback
5. Once policy is finalized with public comments and stakeholder review, teach to sworn personnel through in service
6. Release final policy and require personnel review and signature of comprehension

Evidence of Completion:
1. Directive 1010.00 Use of Force
2. 2013 In Service training materials (located in folder #84)
3. Directive 315.00 Unsatisfactory Performance

Task Date Completed: 2/18/2013

Received DOJ Approval? Approval

2014 Q1 Update: Use of Force Directive 1010.00 underwent its 6 month review. At the end of the quarter it was in the last phase of the process which is additional 15 day Union review before going to Chief for sign off.

2014 Q2 Update: Use of Force Directive 1010.00 was enacted on December 4, 2014 after undergoing its 6 month review process.

2014 Q3 Update: No changes to Use of Force Directive this quarter.

2014 Q4 Update: No change was made to the Use of Force Directive this quarter.

2015 Q1 Update: No changes to Use of Force Directive this quarter.

2015 Q2 Update: No change was made to the Use of Force Directive this quarter.

2015 Q3 Update: No change was made to the Use of Force Directive this quarter.

2015 Q4 Update: No change was made to the Use of Force directive this quarter.

2016 Q1 Update: The Use of Force Directive 1010.00 is currently under review by the Bureau after receipt of DOJ's red-line version. It should be the subject of a monthly DOJ/COCL/PPB directives meeting in the next quarter.

2016 Q2 Update: This policy was not addressed yet in one of the monthly DOJ/COCL/PPB directives meetings. Other directives, such as the mental health and training ones, took priority while discussions among stakeholders continued to try to resolve outstanding issues central to finalizing this policy.

2016 Q3 Update: The PPB received approval to move forward with its plan to combine Directives 1010.00 and 940.00 and revise the current redundant and time-consuming system for After Action review so that it relates to the category of force. PPB initiated work on its draft. A guiding tenet has been ensuring that the use of force principles outlined in the Settlement Agreement are properly incorporated into Bureau policy. A two day "summit" to review and discuss the proposed policy was set for Oct. 26-27. PPB is hoping for approval of the revised policy by the end of the 4th quarter so it can be trained at In-Service in January, 2017.

2016 Q4 Update: The use of force principles outlined in the Settlement Agreement are incorporated into the Bureau’s new draft use of force policy. The Bureau met with DOJ and COCL in late October and again in early December for several full days of discussion regarding these directives. The Bureau is awaiting DOJ approval of the suite of force directives.

2017 Q1 Update: In this quarter, PPB and DOJ came to a general agreement on the language for the Use of Force policy 1010.00 during a policy meeting in February. However, DOJ indicated that final approval would not come until 1010.10 was addressed. So during the time...
that both 1010.10 and 635.10 were being crafted, minor revisions were proposed to 1010.00 as a result. Thus another revised draft of 1010.00 was forwarded to DOJ. It will be discussed at the next face-to-face policy meeting in Q2. However, the revised 1010.00 policy includes language that captures the requirements as listed in paragraph 67 (a), (b), ©, and (d).

2017 Q2 Update: The force principles outlined in the settlement agreement are encapsulated within the new Directive 1010.00 which has been forwarded to DOJ for approval.

2017 Q3 Update: The force principles outlined in the settlement agreement are encapsulated within the new Directive 1010.00 which the bureau began training on this quarter.

2017 Q4 Update: The force principles outlined in the settlement agreement are contained within the new Directive 1010.00 which the Bureau finished training on this quarter.

2018 Q1 Update: The force principles outlined in the settlement agreement are encapsulated within the new Directive 1010.00 approved in 2017.

2018 Q2 Update: The force principles outlined in the settlement agreement are encapsulated within Directive 1010.00

2018 Q3 Update: The force principles outlined in the settlement agreement are encapsulated within Directive 1010.00

2018 Q4 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2019 Q1 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2019 Q2 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2019 Q3 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2019 Q4 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2020 Q1 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2020 Q2 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2020 Q3 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2020 Q4 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00.

During this quarter, PPB and the City had a number of conversations with DOJ regarding proposed changes resulting from legislation passed by the Oregon legislature and the direction of the Mayor/Police Commissioner. The issues were not resolved before the end of December so the decision was made to postpone further discussions for the time being as the Directive is due for its annual review in January. Once the directive goes into Executive Reconciliation, talks will resume.

2021 Q1 Update: The force principles outlined in the settlement agreement are incorporated within Directive 1010.00

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
**Department of Justice Tasks / Quarterly Update Report**

**Task Description**: Revision to Directive 1051.00

**Task Requirements**: PPB shall revise PPB Directive 1051.00 regarding Taser, Less-Lethal Weapon System to include the required principles outlined in the Agreement. See Agreement #68 for specific requirements.

**Status**: Complete - review ongoing

**Action Steps**:
1. Draft changes to Taser Policy that comply with requirements of this provision
2. Meet with stakeholders, including PPA and DOJ, to review changes and receive input
3. Release draft policy for public comment
4. Incorporate and record feedback
5. Once policy is finalized with public comments and stakeholder review, teach to sworn personnel through in service
6. Release final policy following in service and require personnel review and signature of comprehension

**Task Date Completed**: 2/18/2013

**Evidence of Completion**:
1. Directive 1051.00 Electronic Control Weapon System
2. 2013 In Service training materials (located in folder #84)

**Status Note**:

<table>
<thead>
<tr>
<th>2014 Q1 Update</th>
<th>Directive 1051.00 enacted.</th>
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<tbody>
<tr>
<td>2014 Q2 Update</td>
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<table>
<thead>
<tr>
<th>2014 Q3 Update</th>
<th>Directive 1051.00 underwent its mandatory 6 month review. At the end of the quarter, after being posted for the required 30 day public comment phase, it was in the Executive reconciliation phase.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014 Q4 Update</td>
<td>The Electronic Control Weapon (ECW) directive was enacted on December 4, 2014 after completing its 6 month review process.</td>
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</table>

<table>
<thead>
<tr>
<th>2015 Q1 Update</th>
<th>No change to the ECW Directive this quarter.</th>
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<tbody>
<tr>
<td>2015 Q2 Update</td>
<td>There was no change to the ECW Directive this quarter.</td>
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<tr>
<td>2015 Q3 Update</td>
<td>There was no change to the ECW Directive this quarter.</td>
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| 2015 Q4 Update | This directive was posted for its annual universal review on November 1, 2015 for the required 30 day period and is now in the Executive Reconciliation process. |

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<thead>
<tr>
<th>2016 Q1 Update</th>
<th>This directive remains in the Executive Reconciliation process awaiting discussion with DOJ.</th>
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<tbody>
<tr>
<td>2016 Q2 Update</td>
<td>This directive remains in the Executive Reconciliation phase awaiting scheduling with DOJ/COCL/PPB for joint review.</td>
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</table>

| 2016 Q3 Update | During the revision of Directive 1010.00, PPB decided to incorporate the contents of 1051.00 into 1010.00. The newly created policy team worked on the expanded directive in preparation for the summit with DOJ and COCL on the force policy that is scheduled for October 26-27, 2016. Once again, they have ensured that the required principles outlined in the Settlement Agreement are properly incorporated into policy. |

| 2016 Q4 Update | The Directive 1051.00 was substantially revised during 2016 Q4. The revision will result in the eventual rescission of Directive 1051.00. The ECW use policy has been incorporated into 1010.00 Use of Force. Additionally, the administration and qualification requirements for the use of the ECW are now part of the newly drafted 1020.00 Weapons Administration and 1021.00 Weapons Qualifications directives. The revision of Directive 1010.00 Use of Force captures all of the required principles identified in paragraph 68 (a) through (h). |

| 2017 Q1 Update | The CEW use policy is now included as part of 1010.00 (Use of Force). However, the administration and qualification requirements of the CEW is now part of the newly created 1020.00 Weapons Administration and 1021.00 Weapons Qualifications directives. Enactment of the revised 1010.00 now awaits the development of procedures and language acceptable to the DOJ for Directive 1010.10 so that the suite of force directives can be approved as a package. It is hoped that this will occur in the next... |
The revision of directive 1010.00 Use of Force captures all of the required principles as identified in paragraph 68 (a) through (h).

2017 Q2 Update: The use of CEW has been incorporated into the revised Directive 1010.00 which awaits DOJ approval.

2017 Q3 Update: During this quarter, the Bureau began training at In-service on the new Directive 1010.00 which now includes the use of the CEW

2017 Q4 Update: The use of CEW has been incorporated into the revised Directive 1010.00. The Bureau finished In-service training on this directive during this quarter.

2018 Q1 Update: The use of CEW is incorporated in the revised Directive 1010.00 and there was no change to that this quarter.

2018 Q2 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2018 Q3 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter. There was training on the CEW at Fall In-service that commenced on September 6th.

2018 Q4 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter. Training on the CEW continued at Fall In-service which ended in December.

2019 Q1 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2019 Q2 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2019 Q3 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2019 Q4 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2020 Q1 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2020 Q2 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2020 Q3 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2020 Q4 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2021 Q1 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2021 Q2 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2021 Q3 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2021 Q4 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2022 Q1 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2022 Q2 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2022 Q3 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.

2022 Q4 Update: The use of CEW is now addressed in Directive 1010.00 and there was no change to that this quarter.
## Department of Justice Tasks / Quarterly Update Report

### Task Description

Use of Force Reporting Policy revision

### Task Requirements:

PPB shall revise its policies related to use of force reporting. See specific requirements of the Agreement, #69.

### Status

#### Action Steps:

1. Draft changes to Directive 940.00 that comply with requirements of this provision.
2. Incorporate changes into new Force Policy (Directive 1010.00)
3. Ensure concepts within this provision are taught through 2013 In Service and additional Sergeant (supervisor) In Service in early 2014.
4. Release final policy and require personnel review and signature of comprehension

#### Evidence of Completion:

1. 2013 In Service training materials (located in folder #84)

#### Task Date Completed:

11/26/2013

#### Received DOJ Approval?

Approval

### Status Note:

2014 Q1 Update: Directive 940.00 became effective February 19, 2014.

2014 Q2 Update:

2014 Q3 Update: The 940.00 Directive was due for its mandatory 6 month review. During this quarter, it went through the standard directives process including the public comment period. At the end of the quarter, it was in Executive reconciliation.

2014 Q4 Update: The 940.00 After Action Report directive was enacted on December 4, 2014 after completing its 6 month review process.

2015 Q1 Update: No change to Directive 940.00 this quarter.

2015 Q2 Update: There was no change to Directive 940 this quarter.

2015 Q3 Update: There was no change to Directive 940 this quarter.

2015 Q4 Update: All policies related to the use, investigation and reporting of force are under review by the Department of Justice. The Bureau continues to work with DOJ toward crafting policies that reflect the terms of the agreement and are consistent with state and federal law. Status: Awaiting DOJ review.

2016 Q1 Update: Directive 940.00 remains in Executive Reconciliation phase this quarter awaiting scheduling for discussion with DOJ.

2016 Q2 Update: Directive 940.00 was the subject of intense discussion both with DOJ and internally after the City and PPB became aware of the differing interpretations held by the City and DOJ on the breadth of its application. PPB began exploring what resources and staffing would be required to meet the DOJ's expectation as well as how the current 940 process possibly could be streamlined to accommodate some of the significant increase in workload that is anticipated. A proposal will be developed and presented to DOJ in the next quarter.

2016 Q3 Update: PPB met with DOJ and COCL and their experts during the quarter to hone in on what a reasonable solution to this requirement would look like. PPB presented a proposal to which DOJ gave provisional approval to pursue.

PPB then undertook the task of extensively revising 940.00 and the requirements regarding reporting, investigation, and chain of command review are being incorporated into the Bureau’s new use of force directive. In addition, the Bureau has begun beta testing a new After Action form in an effort to conduct reviews more efficiently while still performing a thorough investigation that satisfies all aspects of the Settlement Agreement. It is anticipated that the new force directive incorporating these changes will be submitted for DOJ approval in the fourth quarter of 2016.

2016 Q4 Update: Requirements regarding reporting, investigation and chain of command review of force incidents have been incorporated into the Bureau’s new draft use of force policy 1010.00. This revision as well as the creation of Directive 905.00 Non-Force After Actions will cover all needed after action requirements. The Bureau is awaiting DOJ approval of the suite of force directives. Once 1010.00 is enacted, Directive 940.00 will be rescinded.
The Bureau has begun extensive beta testing of the new After Action report form. That form continues to undergo revision as the Bureau is informed by the experiences of the front line supervisors and command staff conducting investigations and reviews of force incidents.

**2017 Q1 Update:** No further action has occurred on this directive this quarter. As previously noted, it will be rescinded when 1010.00 is enacted. However, that awaits the parties' agreement on language for 1010.10 that is acceptable to the DOJ. Approval is expected to be achieved during the next quarter.

The revision of directive 1010.00's reporting section now includes all of the requirements listed in paragraph 69 (a) and (B). The revision of 1010.00 as well as the creation of directive 905.00 Non Force After Actions will cover all needed after action requirements.

**2017 Q2 Update:** The rescission of this directive has not yet occurred as 1010.00 has not been approved by DOJ as of this date. The new force data collection report for officers was completed this quarter and its roll out will begin next quarter.

**2017 Q3 Update:** Directive 940.00 has been rescinded based on the conditional approval of 1010.00. New data points for force were added to the current RMS force template due to the changes in directive 1010.00. The new force data collection report is currently being worked on to transfer data to the EIS system.

**2017 Q4 Update:** As previously reported, the 940 directive has been rescinded with the approval of 1010.00. New data points for force were added to the current RMS force template due to the changes in directive 1010.00. The new force data collection report is nearing completion and is expected to replace the RMS template sometime during Q1 of 2018.

**2018 Q1 Update:** Implementation of the new force data collection report began in the last part of this quarter. The RMS template will be phased out when all RUs have received training on the new form. PPB expects that to be completed by the end of 2018 Q2.

**2018 Q2 Update:** The new force data collection report (FDCR) has been fully implemented throughout the Bureau. The RMS template has been phased out as of this quarter.

**2018 Q3 Update:** The collection of data related to force continues to be gathered using the new force data collection report (FDCR) in accordance to Directive 1010.00.

**2018 Q4 Update:** The collection of data related to force continues to be gathered using the new force data collection report (FDCR) in accordance to Directive 1010.00.

**2019 Q1 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.

**2019 Q2 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.

**2019 Q3 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.

**2019 Q4 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.

**2020 Q1 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.

**2020 Q2 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.

**2020 Q3 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.

**2020 Q4 Update:** The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.
The collection of data related to force continues to be gathered using the force data collection report (FDCR) in accordance to Directive 1010.00.
Department of Justice Tasks / Quarterly Update Report

<table>
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<tr>
<th>Task Description</th>
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<tbody>
<tr>
<td>Revision and continued enforcement of Directive 940.00</td>
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**Task Requirements:** PPB shall continue enforcement of Directive 940.00, which requires supervisors who receive notification of a force event to respond to the scene, conduct an administrative review and investigation of the use of force, document their findings in an After Action Report and forward their report through the chain of command. PPB shall revise Directive 940.00 to further require that supervisory officers meet the requirements noted in the agreement. See specifics outlined in the Agreement, #70.

**Status**  Actively in Process

**Action Steps:**
1. Draft changes to Directive 940.00 that comply with requirements of this provision
2. Incorporate changes into new Force Policy (Directive 1010.00) as well as the auditing function of the PSD Inspector position materials
3. Ensure concepts within this provision are taught through 2013 In Service and additional Sergeant (supervisor) In Service in early 2014
4. Release final policy and require personnel review and signature of comprehension

**Task Date Completed:**

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<thead>
<tr>
<th>Received DOJ Approval?</th>
<th>Approval</th>
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**Evidence of Completion:**
1. 2013 In Service training materials (located in folder #84)
2. PSD SOP #6

**Status Note:**

- **2014 Q1 Update:** Directive 940.00 became effective February 19, 2014.
- **2014 Q2 Update:**
- **2014 Q3 Update:** Supervisors continue to follow the requirements in 940 when notified of a force event while Directive 940 undergoes its 6 month review. The directive was posted for the requisite 30 days for public comment and at the end of the quarter, was in Executive reconciliation.
- **2014 Q4 Update:** Supervisors received additional training on Directive 940 as part of the EIS training that occurred throughout the month of November. They continued to follow the requirements of the directive which was re-enacted on December 4, 2014 after its 6 month review.

- **2015 Q1 Update:** Directive 940.00 remains in effect with no changes since December enactment.
- **2015 Q2 Update:** No changes were made to Directive 940 this quarter.
- **2015 Q3 Update:** No changes were made to Directive 940 this quarter. Enforcement of its provisions continues.
- **2015 Q4 Update:** Directive 940.00 was posted for its annual universal review on November 1, 2015 for the required 30 day period. It is now in the Executive Reconciliation phase.

- **2016 Q1 Update:** Directive 940.00 remains in the Executive Reconciliation phase this quarter although PPB and DOJ did engage in conversations regarding its requirements. Revisions re: supervisors' responsibilities are forthcoming when the directive is addressed by the parties.

- **2016 Q2 Update:** Directive 940.00 remains in the Executive Reconciliation process this quarter. During Q2 2016, PPB discussed with DOJ the discrepancies between this paragraph of the Settlement Agreement and current PPB policy and practices. As part of the conversations between the City, PPB and DOJ re: the scope of 940 reporting requirements, discussions ensued regarding the role and responsibilities of supervisors up the chain of command. All steps in the current 940 process are being examined and alternative protocols are being explored to present to DOJ for consideration given the time these reports now take and the limited human resources available to assume the significant increase in workload more 940s will generate.

PPB has begun in earnest to draft new policy language and streamline the force reporting and After Action process to allow PPB to fully comply with this section. DOJ has indicated its intent to review and revise Directives 1010.00 and 940.00, the two policies

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that would best address these issues, next in the directives review process.

**2016 Q3 Update:** Directive 940.00 is being extensively revised, and the requirements regarding reporting, investigation, and chain of command review are being incorporated into the Bureau’s new use of force directive. See Action item #69

**2016 Q4 Update:** The Bureau met with DOJ and COCL in late October and again in early December for several full days of discussion regarding the force suite of directives. Requirements regarding reporting, investigation and chain of command review of force incidents that are currently outlined in 940.00 have been incorporated into the Bureau’s new draft use of force policy. All requirements from the Settlement Agreement have been incorporated into this policy. The Bureau is awaiting DOJ approval of these directives.

**2017 Q1 Update:** The revised 1010.00 will incorporate the contents of 940.00. PPB expects that to be approved next quarter. The new 1010.00 captures all of the required principles as well as the elements of paragraph 70 (a) through (d).

**2017 Q2 Update:** The Bureau will continue to enforce the current 940 directive until such time as the new Directive 1010.00 which includes the requirements outlined in this paragraph has been approved. The parties anticipate that will happen early in the next quarter so that the force policies may be trained at the next In-service.

**2017 Q3 Update:** The new 1010.00 directive was enacted in August and incorporates all the elements of the old 940 directive and thus the requirements of this paragraph.

With regard to (b), the EIS Team has tracked this information since at least 2015. For this quarter, PSD received 65 total email notifications for use of force in the categories listed in the paragraph. (Note, there were no reports of suspected officer misconduct regarding force in Q-3, and there was only one notification for Serious Use of Force).

**2017 Q4 Update:** The new 1010.00 directive is in effect and incorporates all the elements on the old 940 directive.

With regard to (b), PSD received 74 total email notifications for use of force in the categories listed above in this quarter. There were no reports of suspected officer misconduct regarding force in Q4.

**2018 Q1 Update:** Directive 1010.00 remains in effect and incorporates all the elements on the old 940 directive. Supervisors continue to provide an administrative review of all force cases through the chain of command.

**2018 Q2 Update:** Directive 1010.00 remains in effect with no change this quarter. Supervisors continue to provide an administrative review of all force cases through the chain of command.

**2018 Q3 Update:** PPB Supervisors continue to provide an administrative review of all force cases through the chain of command in accordance to Directive 1010.00.

During this quarter, the PSD EIS Team continued to collaborate with the PSD Force Audit Team to analyze the performance of PPB supervisors and their compliance with the notification requirements for members Serious Use of Force and Force against Individuals with Mental Illness (DIR 1010.00, Sec. 12.8).

Through this collaboration, the PSD Force Audit Team identified sixty-three (63) instances in which the PSD EIS Team should have been notified. In reviewing notifications archived by the PSD EIS Team it was discovered that notification occurred sixty (60) times, resulting in a compliance rate of 95%. Note, there were no reports of suspected officer misconduct regarding force in Q3.

The PSD EIS Team reviewed the EIS PDT entries for those members who used force in the three (3) required instances in which PSD was not notified. PDT entries were made for all members who used force in that incident. One of the force incidents that PSD was not given written notification was due to the fact the Sergeant contacted the PSD Lieutenant by phone.

To help remind the responsible Sergeants who failed to notify the PSD in the other two incidents, the EIS Lieutenant made PDT entries in the Sergeant’s EIS record.

This is the third quarter the PSD EIS Team has audited compliance of the required PSD Notification process.

**2018 Q4 Update:** PPB Supervisors continue to provide an administrative review of all force cases through the chain of command in accordance to Directive 1010.00.

The PSD Force Audit Team identified fifty-five (55) instances in which the PSD EIS Team should have been notified, per directive. In reviewing notifications archived by the PSD EIS Team, it was discovered that notification occurred fifty-three (53) times, resulting in a compliance rate of 96%. The list of required notifications per the Audit team and corresponding PSD Email
notification list can be found in the supporting documents.
The PSD EIS Team reviewed the PDT entries for those members who used force in the two (2) required instances in which PSD was not notified. PDT entries were made for all members who used force in those incidents. It should be noted there was a third incident in which PSD was not given written notification; however, PSD was notified by phone in that incident.
To help remind the responsible Sergeants who failed to notify the PSD EIS Lieutenant in the other two incidents, the EIS Lieutenant made PDT entries in the responsible Sergeant’s EIS record.
This is the fourth quarter the PSD EIS Team has audited compliance of the required PSD Notification process.

There were no reports of suspected officer misconduct regarding force in Q4.

2019 Q1 Update: PPB Supervisors continue to provide an administrative review of all force cases through the chain of command in accordance to Directive 1010.00.
The PSD Force Audit Team identified 75 instances in which the PSD EIS Team should have been notified, per directive. In reviewing notifications archived by the PSD EIS Team, it was discovered that notification occurred 74 times, resulting in a compliance rate of 99%. The list of required notifications per the Audit team and corresponding PSD Email notification list can be found in the supporting documents.
The PSD EIS Team reviewed the PDT entries for those members who used force in the one (1) required instance in which PSD was not notified. PDT entries were made for all members who used force in that incident.
To help remind the responsible Sergeant who failed to notify the PSD EIS Lieutenant, the EIS Lieutenant made a PDT entry in the responsible Sergeant’s EIS record.

There were no reports of suspected officer misconduct regarding force in Q1.

2019 Q2 Update: In this quarter, the PSD EIS Team continued to collaborate with the Force Audit Team to analyze the performance of PPB supervisors and their compliance with the notification requirements for members' Serious Use of Force and Force against Individuals with Mental Illness (DIR 1010.00, Sec. 12.8).
Through this collaboration, the PSD Force Audit Team identified eighty-eight (88) instances in which the PSD EIS Team should have been notified, per directive. In reviewing notifications archived by the PSD EIS Team, it was discovered that notification occurred all eighty-eight (88) times, resulting in a compliance rate of 100%.

Note, there were no reports of suspected officer misconduct regarding force in Q2.

2019 Q3 Update: In the third quarter, the PSD EIS Team continued to work with the Inspector General’s (IG) Force Audit Team to analyze the performance of PPB supervisors and their compliance with the notification requirements for members' Serious Use of Force and Force against Individuals with Mental Illness (DIR 1010.00, Sec. 12.8).

Through this process, the Force Audit Team identified ninety (90) instances in which the PSD EIS Team should have been notified, per directive. In reviewing notifications archived by the PSD EIS Team, it was confirmed that notification occurred in all ninety (90) cases, resulting in a compliance rate of 100% (pending final comparison).

Note, there were no reports of suspected officer misconduct regarding force in Q3.

2019 Q4 Update: In this quarter, the PSD EIS Team continued to collaborate with the Office of Inspector General’s (OIG) Force Audit Team to analyze the performance of PPB supervisors and their compliance with the notification requirements for members' Serious Use of Force and Force against Individuals with Mental Illness (DIR 1010.00, Sec. 12.8).
The OIG’s Force Audit Team identified seventy-four (74) instances, per directive, in which the PSD EIS Team should have been notified. In reviewing notifications archived by the PSD EIS Team it was discovered that notification occurred all seventy-four (74) times, resulting in a compliance rate of 100%.
Further, there were no reports of suspected officer misconduct regarding force in this quarter.

2020 Q1 Update: Through the collaboration of the EIS and OIG's Force Audit teams, EIS was able to analyze supervisors' compliance with
notification requirements in Dir. 1010.00 on Serious Use of Force and Force against individuals with mental illness. The Force audit team identified fifty-nine (59) instances in which the EIS team should have been notified. EIS team verified that notification occurred in all 59 cases, resulting in a compliance rate of 100%.

There was one report of suspected officer misconduct regarding force in this quarter but further review determined that no force was used in that incident.

2020 Q2 Update: Through the collaboration of the EIS and OIG's Force Audit teams, EIS was able to analyze supervisors' compliance with notification requirements in Dir. 1010.00 on Serious Use of Force and Force against individuals with mental illness. The OIG Force Audit Team identified seventy-four (74) instances in which the PSD EIS Team should have been notified, per directive. In reviewing notifications archived by the PSD EIS Team it was discovered that notification occurred all seventy-four (74) times, resulting in a compliance rate of 100%.

There were no reports of suspected officer misconduct regarding force in Q2.

2020 Q3 Update: EIS and OIG's Force Audit team again worked together to analyze supervisors' compliance with the notification requirements in Dir. 1010.00 on Serious Use of Force against persons with mental illness.

In the third quarter, the PSD EIS Team was notified of seventy-five (75) instances of this type of force, per directive. PSD has archived these notifications and will conduct a comparison analysis upon receiving a finalized list of case numbers from the OIG Force Audit Team.

2020 Q4 Update: Each quarter the PSD EIS Team collaborates with the Office of Inspector General (OIG) Force Audit Team to analyze the performance of PPB supervisors and their compliance with the notification requirements for members Serious Use of Force and Force against Individuals with Mental Illness. During the fourth quarter, the PSD EIS Team was notified of fifty-eight (58) instances of this type of force, per directive. There were no instances of reported officer misconduct in Q4.

2021 Q1 Update: During this quarter, the PSD EIS Team continued to collaborate with the Office of Inspector General (OIG) Force Audit Team to analyze the performance of PPB supervisors and their compliance with the notification requirements for members Serious Use of Force and Force against Individuals with Mental Illness (DIR 1010.00, Sec. 12.8).

Through this collaboration, the OIG Force Audit Team identified seventy-one (71) instances in which the PSD EIS Team should have been notified, per directive. In reviewing notifications archived by the PSD EIS Team it was discovered that notification occurred all seventy-one (71) times, resulting in a compliance rate of 100%.

There were no reports of suspected officer misconduct regarding force in Q1.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
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Task Description
Patrol supervision staffing requirements

Task Requirements:
PPB shall maintain adequate patrol supervision staffing, which, at a minimum, means that PPB and the City shall maintain its current sergeant staffing level, including the September, 2012 addition of 15 sergeants.

Status Complete - review ongoing

Action Steps:
1. Establish supervisor ratio standard from November 2012
2. Track budget processes to ensure ratio is maintained
3. Produce budget/operations report on staffing ratio

Task Date Completed: 6/20/2013

Evidence of Completion:
1. Supervisor to officer ratio 5-year graph

Task Date Completed: 6/20/2013

Received DOJ Approval? Approval

Status Note:
2014 Q1 Update: Sergeant staffing level remained as ordered for the quarter
2014 Q2 Update: Sergeant staffing level remained as ordered for the quarter
2014 Q3 Update: Authorized Sergeant staffing level remained as ordered for the quarter
2014 Q4 Update: Authorized Sergeant staffing level remained as ordered for the quarter.
2015 Q1 Update: Authorized Sergeant staffing level remained as ordered for the quarter.
2015 Q2 Update: Authorized Sergeant staffing level remained as required during this quarter.
2015 Q3 Update: The Sergeant staffing level required by the agreement continued to be authorized by City Council's approved budget for PPB this quarter.
2015 Q4 Update: The Sergeant staffing level required by the agreement continued to be authorized by City Council's approved budget for PPB this quarter.
2016 Q1 Update: The Sergeant staffing level required by the agreement continued to be authorized by City Council's approved budget for PPB this quarter.
2016 Q2 Update: The Sergeant staffing level required by the agreement continued to be authorized by the City Council's approved budget for PPB this quarter. However, the Bureau does experience occasional dips in actual numbers as sworn members retire but the number of patrol officers is also greatly reduced from the time the Agreement was signed.
2016 Q3 Update: The Sergeant staffing level required by the agreement continued to be authorized by the City Council's approved budget for PPB this quarter. However, the Bureau does experience occasional dips in actual numbers as sworn members retire but the number of patrol officers is also greatly reduced from the time the Agreement was signed.
2016 Q4 Update: The Sergeant staffing level required by the agreement continued to be authorized by the City Council's approved budget for PPB this quarter. However, the Bureau does experience occasional dips in actual numbers of Sergeants as sworn members retire but the number of patrol officers is also greatly reduced from the time the Agreement was signed.
2017 Q1 Update: The Sergeant staffing level required by the agreement continued to be authorized by the City Council's approved budget for PPB this quarter. However, the Bureau does experience occasional dips in actual numbers of Sergeants as sworn members retire but the number of patrol officers is also greatly reduced from the time the Agreement was signed. Thus the Sgt. to patrol officer ratio is as good or better than when agreement was signed.

However, PPB did conduct a Sergeants' exam this quarter and expects to promote a number of members early in Q2 after the list is completed.

2017 Q2 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB
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for this quarter. However, in this quarter 11 officers were promoted to the rank of Sergeant so the precincts received a boost in "real" sergeants, rather than just acting, so the total number at precincts is now 78.

2017 Q3 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter.

2017 Q4 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter.

2018 Q1 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter.

2018 Q2 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. Due to promotions, another Sergeants' test will be held in September to fill vacancies that may exist.

2018 Q3 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. The Sergeant's test that was anticipated in September was moved to October.

2018 Q4 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. The Sergeants' test was conducted in October. The results were issued on November 28th. Promotions are expected to occur early in 2019.

2019 Q1 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. The promotion ceremony for Sergeants is set for April 10, 2019. Nine officers are scheduled to be promoted on that date.

2019 Q2 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. It was announced that eleven officers will be promoted to sergeant in a ceremony held on July 11, 2019.

2019 Q3 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter.

2019 Q4 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. A Sergeant's test was administered during this quarter. Promotions are anticipated to occur sometime in the next quarter.

2020 Q1 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. The Bureau's overall staffing ratio of Sergeant to officers is 4.5 to 1 at this time.

In March, the Chief promoted 20 officers to the rank of Sergeant.

2020 Q2 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter.

2020 Q3 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter.

2020 Q4 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter. The Bureau's overall staffing ratio of Sergeant to officers is 4.7 to 1 at this time.

2021 Q1 Update: The Sergeant staffing level required by the Agreement continued to be authorized by the City Council's approved budget for PPB for this quarter.

Friday, May 7, 2021
The Bureau's overall staffing ratio of officers to Sergeant is 5:0 to 1 this quarter.
**Task Description**

Supervisor investigation checklist for use of force investigations

**Task Requirements:** PPB shall develop a supervisor investigation checklist to ensure that supervisors carry out these force investigation responsibilities. PPB shall review and revise the adequacy of this checklist regularly, at least annually.

**Status** Complete - pending external review

**Action Steps:**
1. Draft checklist between Training Division and Professional Standards Division
2. Meet with stakeholders (including current Sergeants) to review and edit
3. Release and distribute checklist
4. Incorporate checklist into early 2014 Supervisor In Service training

**Evidence of Completion:**
1. Draft checklist

**Task Date Completed:** 11/18/2013

**2014 Q1 Update:** Supervisor's Review checklist completed and distributed.

**2014 Q2 Update:**

**2014 Q3 Update:** Checklist revised to mirror Agreement's requirements but cannot be finalized until the 6 month review of Directive 940 is complete. That is in Executive Reconciliation at this time.

**2014 Q4 Update:** After the 6 month review of Directive 940 was completed, the Directive was re-enacted on December 4, 2014. The revised checklist can now be posted on the Bureau's Intranet for reference.

**2015 Q1 Update:** The checklist was condensed to a one-page two-sided document that was laminated and provided to all Sergeants in the Operations branch.

**2015 Q2 Update:** Supervisor checklist remains available to all Sergeants for use in reviewing officers' reports.

**2015 Q3 Update:** The Supervisor checklist remains available to all Sergeants when reviewing officers' reports. Its utilization is evidenced by the quality of the reports as noted by the Inspector who reads them all.

**2015 Q4 Update:** The Supervisor checklist remains unchanged this quarter and available to all Sergeants when reviewing officers' reports. Although there is no language in the agreement supporting its position, DOJ asserts that PPB should require supervisors to use the checklist for each After Action and submit a completed copy for chain of command review as evidence of its use. The Bureau believes the checklist was intended as a quick-reference device to aid supervisors and not intended to duplicate Directive 940.00 as this would be redundant. If DOJ's position prevails, then policy must be revised first to reflect that members are required to use the checklist. If that is the expectation, it is important to establish the rules before attempting to measure compliance with them.

With regard to the technical assistance suggestions from DOJ as to the content of the checklist, the Inspector does not object to their incorporation in the next revision of the checklist that is due in March 2016, or sooner if substantive changes to PPB policy occur.

**2016 Q1 Update:** The Supervisor’s checklist remains available to all Sergeants when reviewing their officers' reports. It was due for its annual revision in March 2016. The Inspector believes, and Mr. Geissler agrees, that the checklist should be made to model PPB policy. Directive 940.00 is under review by PPB and then DOJ so is likely to change. Thus the Inspector suggested creating the new checklist after the directive is finalized.

DOJ has previously recommended that PPB mandate the use of the checklist and documentation of such in all cases. If adopted, the Inspector suggests this requirement be added to Directive 940.00 so members are aware and can comply.

**2016 Q2 Update:** The Supervisor's checklist remains available to all Sergeants when reviewing their officers' reports. The Checklist is due for yearly revision. The Inspector believes, and Mr. Geissler has agreed, the checklist should be made to model PPB policy. Directive 940.00 is under review by DOJ, is likely to change (see Item 70), and the Inspector suggested creating...
the new checklist after the finalization of the directive. Prior recommendations have been made to mandate the use of the checklist in all cases and the Inspector does not disagree. The Inspector suggests this requirement be added to Directive 940.00 so members are aware and can comply. Progress on this item is dependent upon resolution of the issues raised in Item 70 and the revision and approval of Directive 940.00 through consultation with DOJ which is anticipated in the third quarter.

2016 Q3 Update: The Supervisor's checklist remains available to all Sergeants when reviewing their officers' reports. The Checklist is overdue for its yearly revision. However, PPB awaits the finalized revision of 940 as noted last quarter. PPB consulted at length with DOJ and COCL re: reporting requirements and decided to combine 940.00 with 1010.00. Progress has been made in this arena and a face-to-face directives meeting has been scheduled at the end of October with DOJ and COCL. The current plan is to reformat the After Action to incorporate the checklist into the report so that it is utilized every time an After Action is completed. PPB expects that the new form will be implemented in January, 2017.

2016 Q4 Update: The Supervisor's checklist remains available to all Sergeants when reviewing their officers' reports.

After discussions with DOJ and COCL, PPB revised the After Action Report and included an imbedded supervisor's checklist. The revised AAR is dynamic with multiple selection menus and, if appropriate, new selection boxes will appear. The AAR contains all of the required items that supervisors need to complete post use of force. This version is being beta tested and has been successful in ensuring appropriate investigation. The form can be easily modified annually, if needed. Based on the beta testing period and feedback there will be some adjustments, but it will be operational when the new 1010.00 Use of Force is enacted.

2017 Q1 Update: The Supervisor's checklist remains available to all Sergeants when reviewing their officers' reports.

The revised After Action Report (AAR) with imbedded supervisor's checklist continues to be beta tested. Directive 1010.00 Use of Force, which includes the revised AAR, remains in the Executive Reconciliation phase as PPB and DOJ work on finalizing the revised policy.

2017 Q2 Update: As mentioned in the previous quarter, the new After Action form has a checklist imbedded into it. The Bureau is awaiting DOJ approval of the revised policies to then roll out the newest version of the After Action form that is tied directly to the new 1010.00 policy.

2017 Q3 Update: The newest version of the After Action Report (AAR) with the imbedded checklist is now being used by members. It is tied directly to the new Directive 1010.00. Some minor glitches are being worked out of the form but those did not affect the data.

2017 Q4 Update: No change this quarter. The newest version of the After Action form that is tied directly to the new 1010.00 is currently in use. Small refinements to the form continue.

2018 Q1 Update: No change this quarter in that the newest version of the After Action has a checklist imbedded into it and is currently being used. With the implementation of the new FDCR, PPB is currently working on revising the After Action to eliminate duplicative work by the supervisors in collecting the data. The Bureau anticipates beta testing in Q2 2018.

2018 Q2 Update: The checklist is imbedded in the After Action report (AAR). It is reviewed and revised each time the AAR form is refined so it is actually addressed more than on an annual basis. Beta testing of the new AAR occurred in Q2 2018. All supervisors received training in the new AAR during the Spring In-service so it will be implemented in Q3 of 2018.

2018 Q3 Update: The newest version of the After Action report form is now being used Bureau-wide by all supervisors reviewing force. The form has a checklist imbedded into it.

2018 Q4 Update: The latest version of the After Action report form is now being used Bureau-wide by all supervisors reviewing force. The form has a checklist imbedded into it.

2019 Q1 Update: The After Action report form being used by all supervisors was not changed in any way this quarter. The checklist remains imbedded within it.

2019 Q2 Update: The After Action report form being used by all supervisors was not changed in any way this quarter. The checklist remains imbedded within it.

2019 Q3 Update: The After Action form has not changed and continues to be used by all supervisors Bureau-wide when reviewing force. The form
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has an embedded checklist.

2019 Q4 Update: The After Action form has not changed and continues to be used by all supervisors Bureau-wide when reviewing force. However, revisions are currently under consideration to capture additional identified types of force that the Bureau wishes to capture. The form has an embedded checklist.

2020 Q1 Update: The After Action form was updated after 1010.00 revisions to add the new use of force application. It continues to be used by all supervisors in the Bureau when reviewing force. The form has an embedded checklist.

2020 Q2 Update: No changes were made to the After Action form this quarter. It continues to be used by all supervisors Bureau wide when reviewing force. The form has an embedded checklist.

2020 Q3 Update: No changes were made to the After Action form this quarter. It continues to be used by all supervisors Bureau-wide when reviewing force. The form has an embedded checklist.

2020 Q4 Update: No changes to the After Action form were made this quarter. It continued to be used by all supervisors when reviewing the use of force. The form still has an embedded checklist. The Force Inspector assures that all new Sergeants receive the form and know how to utilize it properly.

2021 Q1 Update: No changes to the After Action form were made this quarter. It continues to be used by all supervisors when reviewing uses of force. The form still has an embedded checklist. The Force Inspector assures that all new Sergeants receive the form and know how to utilize it properly.

However, the long-term protest activity that PPB experienced from the end of May through this quarter brought to light the need to make some adjustments to the After Action form for crowd control events. So discussions were commenced and revisions were suggested. PPB expects to initiate those changes in the next quarter after training on the changes is conducted for members.

2021 Q2 Update: No changes to the After Action form were made this quarter. It continues to be used by all supervisors when reviewing uses of force. The form still has an embedded checklist. The Force Inspector assures that all new Sergeants receive the form and know how to utilize it properly.

However, the long-term protest activity that PPB experienced from the end of May through this quarter brought to light the need to make some adjustments to the After Action form for crowd control events. Revisions to the form have been proposed. PPB expects to initiate those changes as soon as feasible after training on the changes is conducted for members, likely in the next quarter.

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:

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Task Description
Policies regarding chain of command reviews

Task Requirements: PPB shall revise its policies concerning chain of command reviews of After Action Reports, as necessary, to require that the policies meet all seven requirements noted in the Agreement.

See specific requirements outlined in the Agreement, #73.

Status  Complete - pending external review

Action Steps:
1. PPB will review and revise Directive 940.00 accordingly to account for the requirements per the Agreement
2. PPB will ensure that the PSD Inspector implements compliance with 73 (a) - EIS reporting

Task Date Completed: 11/26/2013

Evidence of Completion: 1. PSD SOP #6 (located in folder #70)

Received DOJ Approval? Approval

Status Note:
2014 Q1 Update: Dir. 940.00 became effective February 19, 2014. Supervisors were trained on the proposed draft at their In-Service in January, 2014

2014 Q2 Update: Directive 345.00 (EIS) was posted for its initial public comment period on August 1, 2014 and Directive 940.00 was posted for its mandatory 6 month review on the same date. Both are in final stage of Executive Reconciliation. PSD developed a refresher training module for 940 as well as for EIS which will be conducted through the month of November, 2014 for all supervisors from Sergeants on up the chain of command.

2014 Q3 Update: Directive 345.00 was enacted on October 30, 2014. Section 5 through 5.3 documents the procedure for tracking all chain of command reviews of 940.00 After Action Reports. The findings, as well as any non-disciplinary corrective actions taken, will be documented in the Performance Discussion Tracker (PDT) section of the Employee Information System (EIS).

2014 Q4 Update: Both Directive 345.00 (EIS) and 940.00 (After Actions) remain in effect as enacted.

2015 Q1 Update: Directive 345.00 (EIS) was posted for its 30 day universal review on April 1, 2015 for its required 6 month review. It remains in Executive reconciliation at the close of the quarter.

2015 Q2 Update: Directive 940.00 remained in effect with no changes this quarter. Directive 345.00 (EIS) was posted for 30 day universal review on April 1, 2015 for its required 6 month review. Directive 940.00 is in the Executive Reconciliation phase awaiting docketing on the monthly DOJ/COCL/PPB directives review calendar.

2015 Q3 Update: Directive 940 remains in effect while awaiting scheduling for a monthly PPB/COCL/DOJ Directives meeting. It is anticipated that this will occur next quarter. Directive 345.00 was the subject of one of the PPB/COCL/DOJ monthly Directives meetings this quarter. PPB, DOJ, and COCL worked together to revise and update the EIS directive. The parties agreed to revisions and PPB sent its edited version to DOJ. It is currently awaiting DOJ’s final approval. The changes proposed will significantly change the way an employee’s chain of command is required to process an alert, resulting in a more timely, transparent, and accountable response to an alert. PPB and DOJ have also agreed to increase the number of events requiring an EIS entry in the interest of providing more thorough

2016 Q1 Update: Directive 345.00 does not align fully with this section (part a) and will be revised. DOJ participated in a day-long site visit of PPB’s EIS in January. PPB now awaits DOJ’s technical assistance letter with its suggestions for changes to the system. Directive 940.00 is in the Executive Reconciliation phase awaiting docketing on the monthly DOJ/COCL/PPB directives review calendar.

2016 Q2 Update: Directive 940 remains in effect while awaiting scheduling for a monthly PPB/COCL/DOJ Directives meeting. It is anticipated that this will occur next quarter.
In conjunction with the directive review, PSD has been revising its SOP for processing alerts. In the past, the EIS Administrator decided whether to send an alert out for supervisor review. This decision relied heavily on the EIS Administrator’s judgment which appeared subjective. Although all alerts, even those recommended for declination, are scrutinized by the Lt. as well, PPB decided to establish articulable criteria for this determination. Under the new proposed structure, all alerts would be sent out to supervisors unless they fell into one of a few specified exceptions, such as the event(s). This SOP is also under review by DOJ.

PPB has also been working on improving the transparency of the EIS program itself. Currently, only people assigned to review an alert and people with administrative rights are able to view alerts in EIS. Because alerts can provide valuable insights to supervisors, PPB has long wanted to make the alert system viewable to employees in the same way that the PDT is viewable. Due to a backlog of other projects and the complexity of this undertaking, PPB’s contracted programmer was unable to begin this project until the 2nd quarter of 2016. He delivered a prototype early in the 3rd quarter. PPB expects to implement this upgrade sometime in the 3rd or 4th quarter of 2016, depending on how long it takes to refine the prototype into the finished product.

2016 Q3 Update: As noted in #72, PPB is currently in the process of revising 940.00 in conjunction with 1010.00. The Bureau is looking to complete that and gain final approval by the end of the 4th quarter.

Directive 345.00 has been completed and PPB is just awaiting the acceptance letter from DOJ. As soon as that is received, PPB will proceed to enact it and train to it. The SOP addressing the handling of EIS alerts has also been revised and is awaiting final DOJ approval. The alert system has been updated and is now viewable to employees.

Supervisors' In-Service is scheduled to begin in January, 2017.

2016 Q4 Update: The Bureau met with DOJ and COCL in late October and again in early December for several full days of discussion regarding these directives. Significant progress was made during this quarter. Requirements regarding chain of command review of force incidents have been incorporated into the Bureau’s new draft of 1010.00. The Bureau forwarded its final drafts and is awaiting DOJ approval of these directives.

Directive 345.00 has been approved by DOJ, and will be enacted in early 2017. Supervisors will also receive refresher training on Directive 345.00 during In Service training in early 2017.

2017 Q1 Update: No additional work was done in this regard during the first quarter as PPB awaits DOJ's approval of Directive 1010.00 (Use of Force) which was hammered out in Q4. DOJ, in turn, awaits PPB's draft of Directive 1010.10 so that the two related policies can be considered together.

The submitted draft of 1010.00 section 13 includes language that adequately covers all requirements of paragraph 73 (a) through (g). When the revised 1010.00 is enacted, the current 940.00 will be rescinded because the new 1010.00 will include all of the previous 940.00 requirements that pertain to force after actions reports.

2017 Q2 Update: No change this quarter as the Bureau awaits approval of its revised force policies.

2017 Q3 Update: The new Directive 1010.00 enacted this quarter contains all the requirements that pertain to force after action reports. They were previously found in Directive 940.00 which, as mentioned above, were rescinded when the new 1010.00 directive was enacted.

2017 Q4 Update: No change this quarter.

2018 Q1 Update: No change this quarter.

2018 Q2 Update: No change this quarter.

2018 Q3 Update: No change this quarter.

2018 Q4 Update: No change in the policy has occurred. However, the Directive was posted for its 2nd Universal Review from December 1, 2018 through December 31, 2018 as part of its 6 month review.

2019 Q1 Update: No change this quarter.

2019 Q2 Update: No change this quarter.
2019 Q3 Update: No change this quarter.
2019 Q4 Update: No change this quarter. The process for review and accountability remains the same as previous quarters.
2020 Q1 Update: No change this quarter. The process for review and accountability has remained the same as previous quarters.
2020 Q2 Update: The process for review and accountability has remained the same as previous quarters. However, the review system has been strained due to the civil unrest the City of Portland has experienced since May 29, 2020.
2020 Q3 Update: The designated process for review and accountability of force has remained the same this quarter. However, the sheer volume of reports associated with the ongoing nightly protest event that were written in this quarter made it very difficult to meet the timelines that were originally contemplated for the usual use of force incidents.
    The Audit team continues to document deficiencies in the command review process which are addressed by the Inspector via feedback and quarterly meetings with each RU.
2020 Q4 Update: The designated process for review and accountability of force has remained the same this quarter.
The Force Audit Team continues to document deficiencies in the command review process which are addressed by the Inspector via feedback and quarterly meetings with each RU, to include EIS entries and corrective action when appropriate.
2021 Q1 Update: The designated process for review and accountability of force has remained the same this quarter. The Force Audit Team continues to document deficiencies in the command review process which are addressed by the Inspector via feedback and quarterly meetings with each RU, to include EIS entries and corrective action when appropriate.

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**Task Description**
Review and Audit of Force Reports and Bureau Directives

**Task Requirements:** In consultation with the COCL, the Inspector, as part of PPB's quarterly review of force, will audit force reports and Directive 940.00 Investigation Reports to ensure the requirements of the Agreement #74 are met.

**Status**
Complete - review ongoing

**Action Steps:**
1. Develop SOP for Inspector position that complies with requirements of this provision
2. Inspector will work with COCL to develop report format on sufficiency of supervisory reviews of force
3. Create quarterly reports on Use of Force that include qualitative review of force events

**Task Date Completed:** 4/16/2013

**Evidence of Completion:**
1. PSD SOP #6 (located in folder #70)
2. Quarterly Reports on Use of Force
3. Email from Inspector on trends found in force reporting
4. Force Data Collection Report (FDCR) comparison graphs
5. PPB Force Trend 5-year graph

**Status Note:**

2014 Q1 Update: Inspector continues to issue quarterly force reports while awaiting appointment of COCL. PPB anticipates a more detailed report based on the data enhancements implemented to obtain additional information required by the Agreement.

2014 Q2 Update: Inspector issued quarterly force reports. Given no COCL as yet, the Inspector continued to review FDCRs and 940s utilizing the subsections listed in the action item as his criteria. He found that the Bureau substantially complied with these requirements. Anticipates discussion with COCL re: methodology for audit.

2014 Q3 Update: The quarterly report is in process but will not be completed until mid/late November as Force reports are approximately 28 days behind in Records entry due to RegJIN issues. Inspector continued to review all FDCRs and 940s but awaits appointment of COCL to determine ultimately the auditing methodology.

2014 Q4 Update: The 4th quarter force reports are near completion as of the date of submission of this report. The required information from Records was available sooner than in the past and timely receipt of After Actions has improved. The City Council agreed to fund two additional crime analyst positions to work with the Inspector to enhance analytical capacity and speed reporting times once RegJIN goes live. However, due to PPB's comprehensive hiring process, these positions are not anticipated to be filled until late Spring/early Summer. Now that COCL has been selected and the contract process complete, the Inspector expects to receive guidance from him on the auditing function that is required as this item is to be performed in consultation with the COCL.

2015 Q1 Update: The 4th quarter report was posted at end of February. The 2014 annual report was completed in March and approved for posting to the Website. The 2015 first quarter report has been prepared and will be posted to the website. This item also requires the Inspector, in consultation with the COCL, to complete an audit of force reports and After Action Reports for specific criteria listed in the Settlement Agreement. The COCL intends to use this audit as a baseline to assess the Bureau and thus offered no input prior to the completion of this initial audit. The audit was completed on May 14, 2015 and forwarded to the Chief of Police for review. The supporting material used in the audit is retained in the Inspector's office for review as needed. The audit itself is supporting documentation of the Bureau’s compliance with Item 74.

2015 Q2 Update: The 2nd quarter report will be delayed due to the effects of the implementation of RegJIN, PPB's new data management system. As a result of the changeover, Records Division is 11 weeks behind in processing all the reports necessary to analyze for this purpose.

2015 Q3 Update: The second quarter report continued to be delayed through the course of the third quarter even after data was available because of the need to address the concerns and suggestions of the COCL. The COCL indicated a desire for more visual depictions (i.e. graphs and charts) and more multivariate analysis. The Inspector's team attempted to respond to the feedback by expanding on the

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The new report was completed with additional charts and graphs as suggested. The draft of it was sent to COCL for approval. PPB awaited approval from COCL before posting the final force report on the website. It is the PPB's goal to establish a content and format that satisfies COCL and DOJ so that it can be utilized in a timely manner each quarter going forward. The third quarter data is available and should be ready for posting shortly if the content and format issues are resolved with COCL.

2015 Q4 Update: The fourth quarter report, which is much more detailed as a result of consultation with the COCL, was completed in a timely fashion and posted to the website.

2016 Q1 Update: The first full quarter of force audits have been completed and the Inspector is now analyzing the data collected. Two additional steps must be taken to fully comply with the terms of this section and the related sections 75, 76 and 77; an accountability system needs to be fully implemented to address the individual deficiencies found during each audit and an audit report must be completed to address trends, policy, training and systemic issues identified through the audit as a whole. These are two very distinct yet equally important functions.

To meet these goals, during this quarter the Inspector developed an individual reporting system for audit findings which are provided in real-time to RU managers, the Chief’s Office, the Training Division, and the Professional Standards Division. The Inspector also provides the RU manager with a response sheet on which each individual finding must be addressed. The RU managers will be required to address the issues and report to their branch assistant chief. The branch assistant chief is responsible for determining if the RU manager’s response adequately addresses the findings of the audit. Once complete, the branch Assistant Chief will provide the Inspector the audit response form, signed by both the RU manager and the branch assistant chief indicating their approval of the response. The Inspector will memorialize both the audit findings report and the audit response report. This information will be used to further inform PPB as to areas where training, policy or practice deviates from the terms of the Settlement Agreement.

The first steps in establishing this process have been initiated. The A/C of Operations and Inspector have met with Command staff to inform them of the new system. The Commanders are now working out the necessary details which must be addressed before this is fully operational.

2016 Q2 Update: The audit data from Q1 has been analyzed and an audit report has been drafted in consultation with COCL as required by this section. The report will be finalized during Q3 2016 and published. Additionally, the accountability system for audit findings and corrective action has been formalized and the Q1 audit finding responses have been delivered to the appropriate branch chiefs for completion. This material will be returned to the Inspector for review and submitted as supporting material during Q3 2016. Additionally, during Q2 the force audit continued, as did the findings and responses. This will be reported in Q3 as the process continues throughout the year.

2016 Q3 Update: The audit data from Q2 has been analyzed and an audit report has been drafted in consultation with the COCL. The report was finalized during this quarter and published. Additionally, the accountability system for audit findings that was created and implemented in Q1 is continuing and the audit findings are being delivered to the appropriate branch assistant chief. The audit material has been delivered back to the inspector for review. During Q3 the force audit continued, as did the findings and response system. This will be reported in Q4 as the process continues throughout the year. The audit findings were summarized and presented to all RU managers for review and an option for questions and discussion regarding the audit was made available. The audit system is in place to review officer force reporting as well as supervisors investigation reporting and chain of command review reporting to ensure compliance with the settlement agreement.

The Q2 audit will be placed on the Portland Police Bureau website for public consumption.

2016 Q4 Update: The audit data from Q3 has been analyzed and an audit report has been drafted in consultation with the COCL, and published on the Bureau's website. Additionally, the accountability system for audit findings that was created and implemented in Q1 is continuing and the audit findings are being delivered to the appropriate branch assistant chief. During Q4 the force audit continued, as did the findings and response system. This will be reported in 2017 Q1 as the process continues. The audit findings were summarized and presented to all RU managers for review and a period for questions and discussion regarding the audit ensued. The audit system is in place to review officer reporting, supervisor investigation and command review to ensure compliance with the settlement agreement.

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2017 Q1 Update: The force data from Q4 has been analyzed and a report has been drafted in consultation with the COCL. Some formatting changes were made to condense the report. Additionally, the accountability system for audit findings that was implemented previously, is continuing and the audit findings are being delivered to the appropriate branch assistant chief. During this quarter, the force audit continued, as did the findings and response system. The audit findings were summarized and will be presented to all RU managers for review. Then a period for questions and discussion regarding the audit will ensue. The audit system remains in place to review officer reporting, supervisor investigation and command review to ensure compliance with the settlement agreement.

2017 Q2 Update: The audit system remains in place. The Inspector and audit analysts became certified law enforcement auditors after successfully completing a two week training through LEIAC this quarter. The force data from the previous quarter was analyzed and a report has been drafted. Audit findings were summarized and provided to the appropriate branch chiefs. RU managers were presented the audit findings as well and discussions ensued as to how the RU managers could use this data effectively.

2017 Q3 Update: The force data from the prior quarter was analyzed and a report was posted, as is the case each quarter now. Audit findings were summarized and provided to the appropriate branch chiefs by the Inspector. RU managers were presented the audit findings as well and discussions ensued as to how the RU managers could use this data effectively.

2017 Q4 Update: The audit team continued its task of analyzing the force data. Pursuant to protocol, it analyzed the data from the previous quarter and drafted a report which will be posted on the web. Audit findings were summarized and provided to the appropriate branch chiefs. RU managers were presented the audit findings as well and discussions ensued as to how the RU managers could use this data effectively. The plan for the future, once the new and improved AAR and FDRC are implemented after training on them at Spring In-service, is to impose a formal feedback loop so the Inspector can track actions taken in response.

2018 Q1 Update: The audit system remains in place. The audit team continued to analyze the quarterly data and draft quarterly reports which were summarized and provided to the appropriate branch chiefs. Regular meetings were held with the RUs to discuss the audit findings as well as what data could be provided to help the RUs manage more effectively. Additionally, the audit team is working on a Force Audit Action Item Report to be used to track and close the loop on all identified trends, equipment, training, tactical, supervisory, or policy issues related to the use of force.

2018 Q2 Update: No change to the audit system, the analysis of the quarterly data or the process of providing drafts of the quarterly reports to the appropriate branch chiefs. Those discussions initiated with the RUs regarding the audit findings as well as what other data would be helpful to manage more effectively are ongoing. Additionally, the audit team completed the development of the Force Audit Action Item Report and will begin utilizing it in Q3 2018. The report will be used to track and close the loop on all identified trends, equipment, training, tactical, supervisory, or policy issues related to the use of force.

2018 Q3 Update: The system of auditing force continues. There are ongoing discussions with the RUs regarding the audit findings as well what data could be provided to help the RUs manage more effectively.

The Force Audit Action Item Report was delayed due to a technical glitch within the form. Implementation of the form will begin in Q4 2018. The audit team is manually tracking all recommendations on all identified trends, equipment, training, tactical, supervisory, or policy issues related to the use of force, to ensure that the loop is closed.

2018 Q4 Update: The audit team continued its task of analyzing the force data and providing that information to the branch chiefs. Meetings with RUs regarding the audit findings were held this quarter. The Inspector used the EIS system to provide RU managers with the findings from the force reports and Phase II audit. The managers, in turn, addressed the findings and responded to the Inspector who verified the actions to close the feedback loop. The Inspector is using his spreadsheet to track and address deficiencies rather than the previously mentioned After Action Item report at this time.

Overall, the audit found that report writing accuracy decreased slightly. The rate of officer, RU Manager, and Chief's Office reporting deficiencies remained less than half a deficiency per case audited. Sergeants, who have the largest number of audit items, incurred approximately 1 deficiency per case audited.

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**2019 Q1 Update:** The audit team continued its job of analyzing the force data and providing that information to the branch chiefs. Meetings with each Precinct Commander and Command staff regarding the results of the audit were held this quarter. The Inspector used the EIS system to provide the Commanders with the findings from the force reports and Phase II audit. Each Command staff, in turn, addressed the findings and responded to the Inspector who verified the actions to close the feedback loop.

The Inspector is using a combination of the spreadsheet and feedback loop form to identify trends and address deficiencies before resolving the issue.

Overall, the audit found that report writing accuracy remained relatively flat, increasing in certain areas, and decreasing in others. The rate of officer, RU Manager, and Chief's Office reporting deficiencies remained less than half a deficiency per case audited. Sergeants, who have the largest number of audit items, continued to incurred only approximately 1 deficiency per case audited.

**2019 Q2 Update:** The audit team continued to analyze force data and provide the information to the branch chiefs. The quarterly meetings with each Precinct command were held to discuss the force data and attendant memo. The Inspector uses the EIS system to provide Precinct command with findings and action items from the force reports and Phase II audit. The managers then use EIS to document their responses. After review of the Command's actions in EIS, the Inspector closes the feedback loop.

Additionally, the Inspector is using a spreadsheet to track the review of reports and After Actions. If there are deficiencies or other issues noted, a feedback form with action items is sent to the RU. After the RU has completed the action items, the feedback loop is closed.

Overall, the audit found reporting accuracy remained similar to the previous quarter. Officers' error rates dropped to less than 0.3 deficiencies per FDCR audited. The error rate by sergeants, lieutenants, and RU managers remains at less than 1 deficiency per case audited for the review of the force event.

**2019 Q3 Update:** The audit team continues to analyze force data and provide the information to the branch chiefs. A quarterly meeting was held with each Precinct command to discuss the force data and memo sent.

The Inspector uses the EIS system to provide RU managers with findings and action items from the force reports and Phase II audit. The managers then use EIS to document their response. After review of the RU manager actions in EIS, the Inspector closes the feedback loop.

Additionally, the Inspector is using a spreadsheet to track the review of reports and After Actions. The Inspector has begun to use a system for feedback with a 30 day deadline and automatic reminders if the due date is approaching.

Overall, the audit found reporting accuracy remained similar to the previous quarter. Officers error rates dropped to less than 0.3 deficiencies per FDCR audited. The error rate by sergeants, lieutenants, and RU managers remains at less than 1 deficiency per case audited for the review of the force event.

**2019 Q4 Update:** The audit team continues to analyze force data and provide the information to the branch chiefs. The Inspector met with each of the Commanders of Central, East, and North in November of this quarter to discuss the force data. He uses the EIS system to provide Commanders with findings and action items from the force reports and Phase II audit. The managers, in turn, use EIS to document their response. After review of the managers' actions in EIS, the Inspector closes the feedback loop.

Additionally, the Inspector is using a spreadsheet to track the review of reports and After Actions. This quarter, the Inspector continued to utilize this system for feedback with a 30 day deadline and automatic reminders if the due date is approaching. All feedback that was sent out has been answered and the matter was closed.

Overall, the audit found reporting accuracy remained similar to the previous quarter. Officers accuracy decreased slightly from 99.6% to 99.5%. The accuracy by sergeants, lieutenants, and RU managers increased in Q4.

**2020 Q1 Update:** The audit team continues to analyze force data and provide the information to the branch chiefs. Meetings are regularly held to discuss the force data with each RU. During this quarter, the meeting with East Precinct occurred on 3/3/2020; with Central...
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Precinct on 3/4/2020, and with North Precinct on 3/5/2020. The Inspector uses the EIS system to provide RU managers with findings and action items from the force reports and Phase II audit. The managers then use EIS to document their response. After review of the RU manager actions in EIS, the Inspector closes the feedback loop.

Additionally, the Inspector is using a spreadsheet to track the review of reports and After Actions. The Inspector continues to use a system for feedback with a 30 day deadline and automatic reminders if the due date is approaching. All feedback sent out has been responded to and closed. Feedback has been sent to the RU’s and Training this quarter. Overall, the audit found officer reporting accuracy increased to 99.6% from the previous quarter's 99.5%.

2020 Q2 Update: The audit team continues to analyze force data and provide the information to the branch chiefs. Meetings are regularly held to discuss the force data with each RU. In this quarter, the meetings occurred on: East Precinct 5/26/2020, NOC on 5/26, 2020, Central Precinct 5/27/2020, and North Precinct 5/27/2020. Due to COVID-19 most meetings were conducted via Zoom.

The Inspector uses the EIS system to provide RU managers with findings and action items from the force reports and Phase II audit. The managers then use EIS to document their response. After review of the RU manager actions in EIS, the Inspector closes the feedback loop.

Additionally, the Inspector is using a spreadsheet to track the review of reports and After Actions. The Inspector continues to use a system for feedback with a 30 day deadline and automatic reminders if the due date is approaching. All feedback sent out has been responded to and closed. Feedback has been sent to the RU’s this quarter.

2020 Q3 Update: Despite the unanticipated demands on the audit team related to protest cases, they continued to analyze and report on the usual force data. In addition, meetings were held with RU managers to discuss the findings of the audit, determine actions required, and follow-up confirmation on what actions were taken. These meetings are documented in EIS.

Phase II audit results are also discussed with individual RU’s on an as-needed basis prior to quarterly meetings. RU managers are required to document their actions in EIS. Meetings or virtual discussions were held as follows: East Precinct on 9/9/2020, North Precinct on 9/3/2020, Central Precinct on 9/1/2020. As mentioned, the Inspector discusses issues that arise with the corresponding RU. These issues are noted on the Phase II tracker.

2020 Q4 Update: The Force Audit Team and the Inspector gradually returned to their normal course of business mid-way through this quarter. They continued to audit force reports to ensure that the conditions of this paragraph are being met. This information is analyzed and provided to the Chiefs. In addition, meetings are held with RU managers to discuss the findings of the audit, determine actions required, and follow-up confirmation as to what actions were taken. These meetings are documented in EIS. Phase II audit results are also discussed with individual RU’s on an as-needed basis prior to quarterly meetings. RU managers are required to document their actions in EIS.

Meetings or virtual discussions were held as follows: East Precinct on 12/1/2020; North Precinct on 12/2/2020; and Central Precinct on 12/1/2020. As mentioned, the inspector discusses issues that arise with the corresponding RU. These issues are noted on the Phase II tracker and feedback loop.

2021 Q1 Update: The Force Audit Team and the Inspector continually audit force reports to ensure that the conditions of this paragraph are being met. This information is analyzed and provided to the Chiefs. In addition, meetings are held with RU managers to discuss the findings of the audit, determine actions required, and follow-up confirmation as to what actions were taken. These issues are noted on the Phase II tracker and feedback loop. These meetings are documented in EIS. Phase II audit results are also discussed with individual RUs on an as-needed basis prior to quarterly meetings. RU managers are required to document their actions in EIS.

Meetings or virtual discussions were held as follows: East Precinct on 03/05/2021; North Precinct on 03/08/2021; and Central Precinct on 03/04/2021.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2021 Q1 Update:
2022 Q1 Update:
2022 Q2 Update:

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2022 Q3 Update:

2022 Q4 Update:

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Task Description: Inspector audits of force reports

Task Requirements: In consultation with the COCL, the Inspector shall audit force reports and Directive 940.00 investigations to determine whether supervisors meet the requirements outlined in the Agreement. See specific requirements outlined in the Agreement, #75.

Status: Complete - review ongoing

Action Steps:
1. Develop SOP for Inspector position that complies with requirements of this provision
2. Inspector will work with COCL to develop report format on sufficiency of supervisory reviews of force

Task Date Completed: 1/15/2013  Received DOJ Approval? Approval

Evidence of Completion: 1. PSD SOP #6 (located in folder #70)

Status Note:

2014 Q1 Update: Inspector is fulfilling the various requirements outlined in the Agreement for each force report pending the appointment of a COCL.

2014 Q2 Update: Inspector reviewed all FDCRs and 940s for supervisors’ compliance. He found supervisors consistently met 11 of the criteria but failed to meet “j” which requires entry into EIS. EIS Directive is on Chief’s list to be reviewed soon to address process and concerns.

2014 Q3 Update: Inspector reviewed all FDCRs and 940s for this purpose and provided his proposed methodology for audit to Compliance team. However, he cannot proceed without further direction/input from yet to be named COCL.

2014 Q4 Update: Inspector continued to review all FDCRs and 940s pending the input of the newly appointed COCL as to how to conduct the audit function. Each record subject to audit was captured and entered into an access database as were the results of whether it met the criteria outlined in this action item. Some of the points are simple compliance checks in that they either did or did not occur. Others require subjective analysis by sworn member with training and experience to make conclusions based on the “reasonable officer” standard set out in the Agreement.

A day-long meeting with the COCL is scheduled for the 3rd week in January during which the Inspector will share the history of force reporting, the current method of reporting, the systems used to track and analyze data, the reporting done thus far and will seek guidance on how the COCL team wishes the Bureau to proceed.

2015 Q1 Update: The Inspector, in consultation with the COCL, is required to complete an audit of force reports and After Action Reports for the adequacy of supervisory investigation and reporting as well as other specific criteria listed in the Settlement Agreement. The COCL intends to use this audit as a baseline to assess the Bureau and therefore offered no input prior to the completion of this initial audit. The audit was completed on May 14, 2015 and forwarded to the Chief of Police for review. The supporting material used in the audit is retained in the Inspector’s office for review as needed. The audit itself is supporting documentation of the Bureau’s compliance with Item 75.

2015 Q2 Update: As noted in the previous report, the COCL made a conscious decision not to “consult” or provide input to the Inspector regarding the methodology to be used prior to the writing and issuance of the initial audit. However, during this quarter, the Inspector did receive feedback from the COCL team on his first audit. Based on that, some adjustments will be made to the 2nd quarter audit but that, too, will be delayed due to the changeover in the Records Management System to RegJIN.

2015 Q3 Update: The Inspector has consulted with the COCL to develop a methodology to be used in audits of force reports as required by Item 75. The initial draft of the methodology has been completed but the specificity that it requires would demand the collection and analysis of more than 300 data points which would impose an unsustainable burden on existing staff due to time involved. Thus COCL and PPB are re-assessing to further pare down the variables to those most critical to supply the required information. It will then be sent to DOJ for approval before auditing begins.

2015 Q4 Update: The Bureau is obligated, through the Force Inspector, to audit and report on members’ compliance with force use, investigation and reporting policies. The agreement does not speak to how that compliance should be measured. The task of creating those metrics was left to the Inspector and the COCL. During the 4th quarter of 2015 the Inspector’s Office has completed the drafting of the metrics to be used in the audit, designed and built the collection tool to be used to gather the data, tested the system and refined it to...

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reduce duplication of work and increase reliability. The Inspector has begun auditing force cases in earnest and anticipates having
data to share with COCL early in the first quarter of 2016. Together, COCL and the Inspector’s Office will create public reports
that document the audit finding.

2016 Q1 Update: The first full quarter of force audits have been completed and the Inspector is now analyzing the data collected.
See Action item #74 for additional details.

2016 Q2 Update: See Action item #74 for details.
2016 Q3 Update: See Action item #74 for details.
2016 Q4 Update: See Action item #74 for details.
2017 Q1 Update: See Action item #74 for details.
2017 Q2 Update: See Action item #74 for details.
2017 Q3 Update: See Action item #74 for details.
2017 Q4 Update: See Action item #74 for details.
2018 Q1 Update: See Action item #74 for details.
2018 Q2 Update: See Action item #74 for details.
2018 Q3 Update: See Action item #74 for details.
2018 Q4 Update: See Action item #74 for details.
2019 Q1 Update: See Action item #74 for details.
2019 Q2 Update: See Action item #74 for details.
2019 Q3 Update: See Action item #74 for details.
2019 Q4 Update: See Action item #74 for details.
2020 Q1 Update: See Action item #74 for details. The accuracy by sergeants and lieutenants remained the same as last quarter but the RU managers
increased in Q1.
2020 Q2 Update: See Action item #74 for details.
2020 Q3 Update: See Action item #74 for details.
2020 Q4 Update: This action item is in line with #74. Non-compliance with sub-paragraphs of this section are noted as deficient and are addressed
through the existing process.
2021 Q1 Update: This action item is in line with #74. Non-compliance with sub-paragraphs of this section are noted as deficient and are addressed
through the existing process.
2021 Q2 Update: 
2021 Q3 Update: 
2021 Q4 Update: 
2022 Q1 Update: 
2022 Q2 Update: 
2022 Q3 Update: 
2022 Q4 Update: 

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Task Description
Inspector Quarterly Analysis of Force Data

Task Requirements:
In consultation with the COCL, the Inspector shall conduct a quarterly analysis of force data and supervisors’ Directive 940.00.

See specific requirements of audit outlined in the Agreement, #76.

Status
Complete - review ongoing

Action Steps:
1. Develop SOP for Inspector position that complies with requirements of this provision
2. Inspector will create quarterly reports on Use of Force statistics and analysis
3. PPB will release reports to the public

Task Date Completed: 4/16/2013

Evidence of Completion:
1. PSD SOP #6 (located in folder #70)
2. Quarterly Force Reports (located in folder #74)

Status Note:
2014 Q1 Update: Inspector issued quarterly report with comment on his noted trends. The annual report for 2013 was also issued, presented to Training Advisory Council (TAC) and placed on PPB's DOJ section of website.

2014 Q2 Update: Inspector issued quarterly report with comments on significant changes in specific force events but believes it is not academically sound to draw conclusions on trends in a quarter based on lack of longitudinal data.

2014 Q3 Update: Inspector's quarterly report is a bit delayed due to backup in Records entry. Continues to await year's worth of data as well as the selection of the COCL for input before opining on any noted trends.

2014 Q4 Update: Inspector's quarterly force report will be ready for posting very shortly as the delay at Records has been reduced. The analysis piece is obviously incomplete because of that as well as the fact that consultation with the COCL, which is required by the Agreement, has yet to occur. That guidance should commence early in the next quarter as the COCL has now been named and meetings have been scheduled in January to begin these discussions.

However, the Inspector did initiate an assessment of the scope of the work required for this, the Bureau's ability to complete the task and a reasonable methodology to use as a starting point with the COCL. That analysis led to the successful lobby for additional resources for the Inspector to fulfill the requirements. Two additional crime analysts will join the team hopefully in late Spring as extensive background checks are required for the successful applicants.

2015 Q1 Update: The Inspector's office completed the quarterly Force Data Summary Report and the quarterly Force Demographics Summary Report. Both of these reports are included as appendices in the audit report and are published as stand-alone documents to aid in consistent reporting on the Bureau’s website.

This item also requires the Inspector, in consultation with the COCL, to perform trend analysis based on the data collected from the audits referenced in Items 74 and 75. The trend analysis was completed along with the audit and included in the report completed on May 14, 2014. The audit report is supporting documentation of the Bureau’s compliance with Item 76 as are the force reports. The Inspector has requested input from the COCL on the frequency of audits and reports as some of the Items in the Agreement appear to require quarterly analysis and yearly reporting while others require quarterly reporting. Because of the substantial layers of command review of force events required by Bureau policy, access to a complete dataset is not possible for up to 28 days after the end of the quarter. Timelines for review of quarterly reports require the Inspector to have all material completed 17 days after that. Given the complexity of analysis required in order to provide useful recommendations, 17 days may prove insufficient.

2015 Q2 Update: During this reporting period the Inspector met with the COCL team and received feedback from them regarding the audit completed in the previous quarter. This item will again be a stand-alone from the audits required under Items 74, 75 and 77. These force reports will continue in the same format as previous quarters and include more substantial trend analysis. The data used to complete these reports comes directly from the new Records Management System (RMS). The data for the second quarter is not yet ready to be analyzed as the Bureau makes changes and improvements to the system. When reliable and accurate
data is available, the analysis will be completed, resulting in the reports called for in this item.

2015 Q3 Update: As noted in #74, the 2nd quarter report was delayed significantly as PPB attempted to respond to COCL feedback on the content and design of the report. The COCL had suggested that the Inspector include more charts and graphs for the public’s information. There was obviously some back and forth as a draft was exchanged with the COCL. As a result, the size and scope of the report was greatly enhanced. Final comment and approval by the COCL was just received at the time of this report’s completion so the second quarter report will be posted shortly.

The 3rd quarter report will be ready in a more timely fashion as the information the analysts need has been designated a priority in the RegJIN system and PPB and COCL have now come to agreement on the content and format of the report.

2015 Q4 Update: As reported in #74, the new and improved Force Data Summary and Force Demographics Summary reports for the fourth quarter were completed in a timely manner and posted to the website.

The quarterly audit portion of this item is underway as noted previously and the yearly report will be completed, in consultation with the COCL, in the first quarter of 2016.

2016 Q1 Update: This item calls for a written report on the findings of the Inspector through the audit process. This is a yearly report and stands in contrast to other provisions of the Settlement Agreement that call for the same material to be presented quarterly. Given the amount of material to be analyzed, the issuance of the annual report will be simultaneous with the submission of the first quarter report due on May 15 rather than by the close of the first quarter.

2016 Q2 Update: The timeline issues raised by the Inspector in the last quarterly report have not yet been addressed but the Inspector intends to release all audit reports as they are completed until further guidance is received.

2016 Q3 Update: The Q2 audit report provided data to allow the Force Inspector to review for any obvious trends in force use as well as to analyze if any one reporting unit uses force at a different rate and/or type than other reporting units.

The analysis also allowed the Force Inspector the capacity to discover that the deficiencies that were identified in Q1 were improving based on the comparison with Q2 data.

2016 Q4 Update: The Q3 force data report provided information to allow the Inspector to review for any obvious trends in use of force as well as to analyze if any one reporting unit uses force at a different rate and/or type than other reporting units.

The Inspector utilized that analysis and data from the Q3 force audit to determine that deficiencies previously identified in Q1 showed progressive improvement through Q3.

2017 Q1 Update: The Q4 force data report provided information for the Inspector to elicit any obvious trends in use of force as well as to analyze if any one reporting unit uses force at a different rate and/or type than other reporting units.

The Inspector compared the data from last quarter with the current quarter and determined that there were no significant changes or notable trends in the use of force from last quarter.

2017 Q2 Update: The Inspector compared the data from the last two quarters and determined that there were no significant changes or notable trends in the use of force. At the direction of COCL the analysts engaged in several more narrowly focused studies of the data (deeper dive into day/time of force events; likelihood of officer injuries associated with use of force and subsequent cost to City; etc) to look for specific trends and no significant ones were identified.

2017 Q3 Update: As in previous quarters, the Inspector compared the data from the last two quarters and determined that there were no significant changes or notable trends in regard to the use of force by individual officer, by units or shifts.

2017 Q4 Update: The Inspector compared the data from the last two quarters and determined that there were no significant changes or notable trends in regard to the use of force by individual officer, by units or shifts.

2018 Q1 Update: After comparing the data from the last two quarters, there were no significant changes or notable trends in regard to the use of force identified by the Inspector.

2018 Q2 Update: There were no significant changes or notable trends in the use of force determined by the Inspector after comparing the data from the last two quarters.
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2018 Q3 Update: Compared to last quarter, the use of force dipped significantly due to reductions that occurred in the months of July and August, while calls for service increased and custodies only nominally declined. Additionally, there was a notable increase in subjects reported to be either alcohol or drug-affected and a decrease in the number of armed subjects. PPB will explore possible causes for this drop in force numbers and continue to monitor and analyze these demographic data points. The goal will be to determine if they are just a one-time occurrence or part of a longer term shift in subject demographics.

The long term trend appears to be that the overall number of incidents and applications of the use of force are slowly decreasing over time. Another notable trend identified was that report writing accuracy generally continues to improve at the officer level.

2018 Q4 Update: The decreasing trend in use of force cases continued in Q4 2018. The number of use of force cases decreased 5% when compared to Q3 2018.

The number of subjects in a mental health crisis decreased 42%.

Additionally, a notable increase in the number of armed subjects occurred in Q4 2018. Subjects armed with a firearm accounted for the largest increase in subject weapon types.

The analysts continue to monitor and explore these reductions in force for trends but have drawn no specific conclusions as to the reason as more longitudinal data is needed.

2019 Q1 Update: The trend of decreasing force cases seen in the latter half of 2018 did not continue in Q1 2019. The number of use of force cases increased 5% in Q1 2019 compared to Q4 2018 (from 177 to 186). The number of subjects in mental health crisis increased 120% in Q1 2019 compared to Q4 2018 (from 15 to 33 subjects). Officers utilized control against resistance and resisted handcuffing force types predominately (75% of the force applications) when taking subjects in a mental health crisis in custody.

2019 Q2 Update: There was a 16% increase in use of force cases compared to Q1. This is in conjunction with a rise in calls for service (12%) and custodies (8%) compared to Q1. Although one quarter's data is not indicative of an issue, the Inspector noted the increase and is exploring potential explanations. He will also review more longitudinal data to see what conclusions, if any, can be gleaned. It is a fact that the Bureau engaged in proactive quarterly missions to meet the crime reduction goals of the Chief's Office.

There was a decrease in force incidents involving persons in mental health crisis and a slight increase in force incidents involving armed subjects.

2019 Q3 Update: For this quarter, there was a 3% decrease in force cases as compared to Q2. There was an increase in calls for service of 4% for this quarter as well. In comparing Q3 to Q2, the numbers are quite similar with very little overall change to the number of force cases.

However, the number of force events involving mental health increased from 12% in Q2 to 21% in Q3. There was also an increase in the applications of CEW this quarter. In previous quarters, officers have documented not utilizing the CEW due to heavy clothing. Those concerns were not documented as much in the summer months of Q3 and may be a factor in the increased use of the CEW. There was also an increase in the use of box-ins to ensure officers were not engaging in pursuits.

2019 Q4 Update: There was a decrease in force cases this quarter when compared to Q4 2019 (-9%). The number of calls for service and custodies also decreased in Q4 compared to Q3. There were no variations in force practices to the directive. The COVID-19 pandemic began to influence the Bureau in March 2020 and believe had an impact on the numbers for Q1.

North Precinct had 19% of the force cases for Q1 and 20% of the applications of force. Of those cases, CEW, Strikes/Kicks, and Takedowns accounted for 25% of their applications. Three officers were at least +3 deviations in strikes/kicks and two of these officers had CEW applications. Many of these applications were in a singular event with a subject in active aggression and do not show a pattern or concern.

Force analysts continue to document deficiencies and these are provided to the RU managers.

2020 Q1 Update: There was a decrease in force cases this quarter when compared to Q4 2019 (-9%). The number of calls for service and custodies also decreased in Q1 compared to Q4. There were no variations in force practices to the directive. The COVID-19 pandemic began to influence the Bureau in March 2020 and believe had an impact on the numbers for Q1.

North Precinct had 19% of the force cases for Q1 and 20% of the applications of force. Of those cases, CEW, Strikes/Kicks, and Takedowns accounted for 25% of their applications. Three officers were at least +3 deviations in strikes/kicks and two of these officers had CEW applications. Many of these applications were in a singular event with a subject in active aggression and do not show a pattern or concern.

Force analysts continue to document deficiencies and these are provided to the RU managers.

2020 Q2 Update: The number of force cases this quarter when compared to Q1 2020 did not change (166 in Q1 and 166 in Q2). The number of calls for service and custodies decreased in Q2 compared to Q1 (calls-for-service -8% and custodies -15%). There were no variations in...
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force practices to the directive. The COVID-19 pandemic continued to influence the Bureau in April-June 2020 and may have had an impact on the calls-for-service and custody numbers during Q2.

2020 Q3 Update: Comparing the data from Q2 2020 to Q3 2020, citizen-initiated calls for service remained relatively the same. Officer initiated calls, custodies, and subjects upon whom force was used all declined. Total calls for service dropped from 82,269 to 69,020 (-16.10%), officer initiated calls dropped from 22,980 to 10,883 (-52.64%), custodies dropped from 4,135 to 3070 (-25.75%), and subjects upon whom force was used dropped from 169 to 142 (-15.97%).

These reductions are also reflected in the findings for both East and Central precincts with regard to their actual force events: East Precinct had a 12.3% decrease and Central Precinct had a 27.5% decrease while North Precinct stayed about the same going from 27 to 28 force events.

The majority of these uses of force also tend to be the lowest level possible (CAT IV) and fit into Control Against Resistance and Resistive Handcuffing.

There were no noted variations in force practices to PPB directives and policies. Force events are led in numbers by Central Precinct’s downtown and old town officers, however this correlates to their call load and response times; they are also usually category IV uses of force which are the lowest possible. There is no doubt that COVID-19, protests and riots, budget and personnel hardships has had an effect on these numbers.

The Force Audit Team in conjunction with the Force Inspector will continue to monitor, review, and audit force used.

2020 Q4 Update: Comparing the data from Q3 2020 to Q4 2020, citizen-initiated calls for service and custodies decreased. Officer initiated calls, the number of force cases, and subjects upon whom force was used increased. Total calls for service remained nearly the same from 69,020 to 68,911 (-0.16%), officer initiated calls increased from 10,883 to 12,162 (12%), custodies dropped from 3,070 to 2,839 (-8%), force cases increased from 139 to 168 (21%), and subjects upon whom force was used increased from 142 to 171 (20%).

The increase in force cases is also reflected in the findings for Central, East, and North precincts with regard to their actual force events: North Precinct had the largest increase 79%, East Precinct had an increase of 16%, while Central Precinct had a more moderate increase of 4%.

The majority (62%) of these uses of force continue to be the lowest level possible (CAT IV) and are applications of Control Against Resistance (34%) and Resistive Handcuffing (28%).

There were no noted variations in force practices to PPB directives and policies. The increase in force cases and officer initiated calls is most likely attributed to the decrease of nightly demonstrations beginning in the fall of 2020. These demonstrations required the bulk of entire shifts at times taking officers away from responding to calls for service and initiating calls as well. North Precinct personnel staffed a mobile field force every night for the demonstrations, whereas Central and East Precinct respectively did not, which likely contributed to North Precinct’s more drastic increase in force cases. The Force Audit Team in conjunction with the Force Inspector will continue to monitor, review, and audit force used.

2021 Q1 Update: When comparing data from Q4 2020 to Q1 2021, officer-initiated calls increased 5% (from 12,162 to 12,788), citizen initiated calls decreased 2% (from 56,749 to 55,740), custodies increased 7% (from 2,839 to 3,049), use of force cases increased 8% (from 168 to 182), and subjects upon whom force was used increased 11% (from 171 to 189).

Of the 3,049 custodies in Q1 2021, 6.20% resulted in a use of force to effectuate that arrest. Category II-III force accounts for about 3.18% of those uses, and Category IV accounts for the other 3.02%.

Of the total number of applications of non-crowd control force this quarter, fifty-seven percent of them were either resisted handcuffing (25%) or control against resistance (32%) which is the lowest level of force.

Subjects in mental health crisis accounted for 21% of subjects involved in force incidents. Over three-quarters (77%) of the applications of force used against subjects in a mental health crisis were the lowest level of reportable force (control against resistance 47%; resisted handcuffing 30%).

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For subjects involved in force incidents, 37% were armed and 46% were drug and/or alcohol affected.

Central Precinct’s cases involving force increased 21% from 52 in the fourth quarter of 2020 to 63 in the first quarter of 2021, while East Precinct’s cases involving force increased 18% from 66 to 78. North Precinct’s cases involving force increased 10% from 50 last quarter to 55 in this quarter.

There were no noted variations in force practices to PPB directives and policies.

Since last quarter and into the current first quarter, there has been a steady increase in force events amongst patrol officers. Most likely this trend is due to patrol officers no longer being detailed to mobile field force teams in response to nightly demonstrations and returning to their core function of responding to calls for service.
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**Task Description**
Chain of command reviews of After Action Reports

**Task Requirements:** In consultation with the COCL, the Inspector shall audit the adequacy of chain of command reviews of After Action Reports using the following performance standards to ensure that all supervisors in the chain of command meet the specific requirements outlined in the Agreement.

See specifics outlined in the Agreement, #77.

**Status** Complete - review ongoing

**Action Steps:**
1. Develop SOP for Inspector position that complies with requirements of this provision
2. Inspector will work with COCL to develop report format on sufficiency of supervisory reviews of force

**Task Date Completed:** 1/15/2013

**Evidence of Completion:**
1. PSD SOP #6 (located in folder #70)

**Status Note:**

**2014 Q1 Update:** Inspector performs this function as matter of course during review of force reports pending the appointment of the COCL.

**2014 Q2 Update:** Absent a COCL, the Inspector continued to monitor the adequacy of the command reviews and found that "a" through "d" are consistently followed; there is an issue with "e" as noted in previous action item; and "f" and "g" have not occurred.

**2014 Q3 Update:** Inspector has drafted a proposed methodology for conducting this audit but awaits consultation with the yet to be named COCL to finalize the process. Meanwhile, he continues to read and assess the adequacy of the command reviews from his perspective.

**2014 Q4 Update:** The Inspector continued to await the guidance of the COCL to fulfill the requirements of this task. With the contracting of the COCL at the end of the quarter, it is anticipated that these discussions will commence in the next quarter.
In the meantime, the Inspector expanded the database he created for Item #75 to capture the 7 performance criteria outlined in this item. By doing so, one can obtain a more robust view of the event itself which will aid in determining where performance, policy or training improvements need to occur.
These criteria generally can be audited from an objective compliance perspective in that they either did occur or did not. However, some circumstances will require a subjective analysis to determine if failure to perform a task constituted a failure to meet performance criteria.

**2015 Q1 Update:** The COCL intends to use this chain of command audit as a baseline to assess the Bureau but offered no guidance as to content prior to the completion of this first audit. Thus the Inspector utilized the methodology he had developed and will await critique. The audit was completed on May 14, 2015 and forwarded to the Chief of Police for review. The supporting material used in the audit is retained in the Inspector’s office for review as needed. The audit itself is supporting documentation of the Bureau’s compliance with Item 75.

**2015 Q2 Update:** During this reporting period the Inspector met with the COCL team and received feedback from them regarding the audit completed under this Action Item in the previous quarter. Later, on July 16, 2015, the COCL team provided their initial input on the methodology to be used to determine compliance with Item 77. The Inspector and COCL are now collaborating on the development of the methodology to be used to address the questions posed in Item 77. When complete, an audit will be conducted and a report issued.
As with the previous audit items, some questions can only be answered when there is an accurate and reliable dataset. Some of this data comes from RegJIN, the new records management system which is totally different from the previous PPDS and is experiencing implementation issues. Thus the data is not yet ready to be analyzed.

**2015 Q3 Update:** This audit, too, will rely on the methodology that the parties ultimately adopt as discussed in #75. Further decisions in that regard will be made in the next quarter and once the methodology is finalized, auditing as required will commence. The data for this endeavor is becoming more readily available as the kinks in the new RegJIN system are worked out.

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During the 4th quarter of 2015 the Inspector’s Office has completed the drafting of the metrics to be used in the audit, designed and built the collection tool to be used to gather the data, tested the system and refined it to reduce duplication of work and increase reliability. PPB has begun to audit force cases in earnest and anticipates having data to share with COCL early in the 1st quarter of 2016. Together, COCL and the Inspector’s Office will create public reports that document the audit finding.

As noted in #74, the first full quarter of force audits have been completed and the Inspector is now analyzing the data collected. Two additional steps must be taken to fully comply with the terms of this section: an accountability system needs to be fully implemented to address the individual deficiencies found during each audit and an audit report must be completed to address trends, policy, training and systemic issues identified through the audit as a whole. These are two very distinct yet equally important functions. To meet these goals, the Inspector has developed an individual reporting system for audit findings which are provided in real-time to RU managers, the Chief’s Office, the Training Division, and the Professional Standards Division. The Inspector also provides the RU manager with a response sheet on which each individual finding must be addressed. The RU manager is required to address the issues and report to his branch assistant chief. The branch assistant chief is responsible for determining if the RU manager’s response adequately addresses the findings of the audit. Once complete, the branch Assistant Chief will provide the Inspector the audit response form, signed by both the RU manager and the branch assistant chief indicating their approval of the response. The Inspector will memorialize both the audit findings report and the audit response report. This information will be used to further inform PPB as to areas where training, policy or practice deviates from the terms of the Settlement Agreement. This should be operational in the next quarter after all the pieces have been implemented.

See Paragraph #74 as the information on the audit includes the chain of command piece.
Task Description

Annual Training Plan Assessment

Task Requirements: The Training Division will review and update PPB’s training plan annually. To inform these revisions, the Training Division shall conduct a needs assessment and modify this assessment annually, taking into consideration all of the requirements of the Agreement. See specific requirements outlined in the Agreement, #79.

Status  Actively in Process

Action Steps:
1. Training Division is currently developing an annual Needs Assessment Process that incorporates the 11 components required by the Agreement
2. Training Division will work with divisions bureau-wide to develop draft needs assessment.
3. Training Division will vet draft needs assessment to ensure compliance with Agreement.
4. Training Division will conduct employee survey to obtain input from officers.

Evidence of Completion: 1. Draft needs assessment process outline.

Task Date Completed: ☐ Received DOJ Approval? Approval

Status Note: 

2014 Q1 Update: Training Division finalized the "needs assessment" tool which will be utilized to craft the Training Plan for 2015. The Division is already gathering input from those who went through In-Service in this quarter as well as from observers.

2014 Q2 Update: Training analyst continued to survey stakeholders with "tool" to determine future training needs of PPB

2014 Q3 Update: The training analyst aggregated info re: hazard trends from an online survey which was reviewed to determine which concerns had Training implications; analyzed officer safety issues from FPDR; received reports form PSD re: problematic uses of force and gathered IA cases for review; and began analyzing In-service surveys and feedback from instructors as well community input through the TAC. Training also considered latest research on perishability of law enforcement skills and relevant changes in state or federal law and PPB policy.

2014 Q4 Update: During this quarter, the Training Division continued to collect, analyze and review data pertaining to the needs assessment. The Training Division, Professional Standards Division, and Strategic Services Division implemented new data collection processes in order to better examine trends in problematic uses of force and concerns reflected in court decisions. The Training Division completed a draft of the 2014 Needs Assessment Report. This report is currently in its final stages of review.

2015 Q1 Update: During this time frame, the review process for the 2014 Annual Training Needs Assessment Report was completed and the report was finalized. The Training Division collected data and information pertaining to officer safety issues, changes in Oregon and Federal law, changes in the PPB policy, Police Vehicle Operations, Problematic Uses of force, research reflecting best practices, the latest in law enforcement trends, and input from the community, for the 2015 needs assessment. In addition, contacts were made to additional parties involved in providing information for the 2015 needs assessment.

2015 Q2 Update: In the second quarter, the Training Division collected data and information pertaining to the following sections of the 2015 needs assessment: analysis of officer safety issues; changes in PPB policy; the DOJ agreement; individual precinct needs; police vehicle operations; defensive tactics, patrol tactics and electronic control weapon; problematic uses of force; trends in hazards officers encounter; research on best practices and latest in trends; and input from the community. In addition, during this time, several sections of the needs assessment were actually drafted and vetted by Training Division staff and others.

2015 Q3 Update: Many sources are used to inform the needs assessment. This includes, but is not limited to, IPR reports, use of force data, officer injury data from the Fire and Police Disability and Retirement, data from the Portland Police Bureau’s officer injuries log, the DOJ Agreement, the Training Advisory Committee, the Behavioral Health Unit and related community advisory committee, City Attorneys, the Portland Police Bureau’s Policy Analyst, national conferences, pursuit data, surveys, and discussions with training leads, precinct commanders, DOJ coordinators, IPR staff, and officer safety liaisons.

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Several sections of the 2015 needs assessment have been worked on during July through September 2015. The 2015 Annual Training Needs Assessment Report has been finalized and is attached in a separate document. A brief summary of the work on the needs assessment during the third quarter includes the following (please see the 2015 Annual Training Needs Assessment Report for further details):

- The in-service CIT refresher training needs were determined by the Behavioral Health Unit, the external Behavioral Health Unit Advisory Committee, and the Training Division’s non-sworn mental health professional.
- Police Vehicle Operations (PVO)
  The Vehicle Pursuit Report and pursuit incident cases that were referred to Internal Affairs were reviewed for training needs.
  The Training Division Analyst and PVO lead instructor, in partnership with additional PVO instructors from PPB and other agencies, continued to conduct research on the interaction of Electronic Stability Control systems with the Pursuit Intervention Techniques. This research was presented at the 2015 ALERT Conference and is being incorporated into training.
- Misconduct Complaints
  The Training Division Analyst met with IPR staff to obtain data and additional feedback pertaining to the 2014 complaints.
  Additional feedback regarding trends in citizen complaints was obtained from the Internal Affairs Lieutenant.
- Problematic uses of force
  The Use of Force Sergeant continued to review After Actions that were referred to the Training Division for potential training implications.
  Several members of the Training Division reviewed and analyzed use of force data, including officer involved shootings and cases that were referred to Internal Affairs, for trends.
- Changes in Oregon and Federal law
  A list of the new 2015 Oregon and Federal laws were obtained from the Portland Police Bureau’s Policy Analyst in August. This list was vetted through the City Attorney and some of the Training Division’s sergeants and command staff to determine which warranted a future training need.
- Research reflecting best practices and the latest in law enforcement trends
  The Use of Force Sergeant continued to collect feedback from lead instructors regarding information from trainings, conferences, and site visits that they attended during the quarter.
- Input from the community
  The Training Division continued to work with the Training Advisory Council (TAC) to obtain community input related to officer training needs. The Training Division provided a presentation to the TAC on the needs assessment in July and solicited feedback pertaining to the needs assessment process and future training need recommendations.
  The Training Division continued to follow up on open tasks in the Tasks and Recommendations Assigned to the Training Division list from the Professional Standards Division.
- The 2015 Annual Training Needs Assessment Report was finalized.

2015 Q4 Update: During October through December 2015, the Training Division began planning and developing the 2016 Annual Training Needs Assessment. This work included, but is not limited to, reviewing and collecting data from Pursuit After Action reports, reviewing After Actions that were referred to the Training Division for potential training implications, collecting information from Training Division staff regarding research and the latest in law enforcement trends, and participating in strategic planning sessions with the Training Advisory Committee to further develop community input related to training.

2016 Q1 Update: During this quarter, the Training Division continued planning and developing the 2016 Annual Training Needs Assessment. This work included, but is not limited to, reviewing and collecting data from Pursuit After Action reports, reviewing After Actions that were referred to the Training Division for potential training implications, collecting information from Internal Affairs regarding cases that were referred for review or investigation, collecting data from the Bureau of Fire and Police Disability Retirement (FPDR) and the FPDR Sergeant on officer injuries, contacting the Internal Police Review for a status on 2015 complaint data analyses, collecting information from Training Division staff regarding research and the latest in law enforcement trends, and meeting with the Training Advisory Council to review and discuss some of the use of force curriculum.

2016 Q2 Update: During this time frame, the Training Division continued developing the 2016 Annual Training Needs Assessment. This work included, but is not limited to, collecting data and assisting with analysis of pursuit data for the Annual Vehicle Pursuit Report,
During this quarter, the Training Division finalized the 2016 Annual Training Needs Assessment. This work included, but is not limited to, reviewing the 2016 IPR Annual Report, meeting with the IPR Director, collecting data from Internal Affairs, collaborating with the Training Advisory Council, and updating the training needs for Defensive Tactics, Firearms, Electronic Control Weapon, Patrol Tactics, and Police Vehicle Operations.

2016 Q3 Update: During this quarter, the Training Division finalized the 2016 Annual Training Needs Assessment. This work included, but is not limited to, reviewing the 2016 IPR Annual Report, meeting with the IPR Director, collecting data from Internal Affairs, collaborating with the Training Advisory Council, and updating the training needs for Defensive Tactics, Firearms, Electronic Control Weapon, Patrol Tactics, and Police Vehicle Operations.

2017 Q1 Update: In the first quarter, the Training Division began collecting information for the current training needs assessment and work on training planning. This work included, but is not limited to, reviewing After Action reports for potential training implications, obtaining updated information regarding new PPB policies, and reviewing literature on law enforcement training, and continuing to collaborate with the Training Advisory Council. A presentation on the needs assessment process and current findings was made to the Training Advisory Council during their November public meeting.

2017 Q2 Update: During this 2017 Q2, the Training Division continued to collect information for the current training needs assessment and work on training planning. This work included, but is not limited to, reviewing After Action reports for potential training implications, obtaining updated information regarding new PPB policies, obtaining court review summaries from the City Attorney’s Office, obtaining updated statistics on force trends and vehicle collisions, conducting Pursuit Intervention Technique research, continuing to collaborate with the Training Advisory Council, and updating the training needs for Defensive Tactics, Firearms, Electronic Control Weapon, Patrol Tactics, and Police Vehicle Operations.

2017 Q3 Update: During this time frame, the Training Division continued to collect information for the 2017 training needs assessment and to work on training planning. This work included, but is not limited to, conducting literature research pertaining to best practices and trends in law enforcement training, obtaining updated information regarding new PPB policies, obtaining court review summaries from the City Attorney’s Office, conducting Pursuit Intervention Technique research, meeting with lead instructors and program managers regarding retention rates in perishable skillsets, and continuing to collaborate with the Training Advisory Council.

2017 Q4 Update: During this time frame, the Training Division completed its collection of information for the 2017 training needs assessment, finalized the 2017 Annual Training Needs Assessment Report, and made substantial progress on 2018 training planning. The work on the needs assessment included, but was not limited to, conducting literature research pertaining to best practices and trends in law enforcement training, obtaining updated information regarding new PPB policies, and reviewing court review summaries from the City Attorney’s Office, analyzing misconduct complaint data, examining trends in officer injuries, conducting Pursuit Intervention Technique research, and continuing to receive input from the community through its collaboration with the Training Advisory Council.

2018 Q1 Update: In the first quarter, the Training Division began collecting information for the 2018 training needs assessment and continued to provide training and support to field level supervisors and managers regarding retention rates in perishable skillsets, and continuing to collaborate with the Training Advisory Council.
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- **2018 Q4 Update:** During this time frame, the Training Division continued to collect information for the 2018 training needs assessment and refined the 2018 training plans. This work included, but is not limited to, obtaining court review summaries from the City Attorney’s Office regarding Federal law changes, meeting with the Professional Standards Division Commander and DOJ Coordinator regarding DOJ related training needs, collecting feedback from unit managers regarding their training needs, and continuing to collaborate with the Training Advisory Council. The Training Division also refined the 2018 In-service training plans in collaboration with the COCL and DOJ.

- **2018 Q3 Update:** In the third quarter, the Training Division completed the 2018 Training Needs Assessment and continued to develop training plans. This work included, but is not limited to, analyzing member feedback on future training needs from 2018 survey items, obtaining information from the City Attorney’s Office regarding Federal law changes, meeting with the Professional Standards Division Commander and DOJ Coordinator regarding DOJ related training needs, collecting feedback from unit managers regarding their training needs, and continuing to collaborate with the Training Advisory Council.

- **2018 Q2 Update:** During this time frame, the Training Division continued to collect information for the 2018 training needs assessment and refined the 2018-3 In-service training plans. This work included, but is not limited to, obtaining and reviewing updates on law enforcement recertification requirements, obtaining misconduct complaint data findings, conducting literature reviews on enforcement training, meeting with the Force Audit Team, collecting input from all sworn members regarding their training needs, and continuing to collaborate with the Training Advisory Council. The Training Division also refined the 2018-3 In-service training plans in collaboration with the COCL.

- **2018 Q1 Update:** During Q1, the Training Division continued to collect information for the 2019 training needs assessment and refined the 2019 training plans. This work included, but is not limited to, conducting literature reviews on law enforcement training, collecting force and unit specific training needs, meeting with lead instructors regarding training needs and planning priorities, conducting literature reviews on law enforcement training, meeting with the Independent Police Review Director and Internal Affairs Lieutenant regarding misconduct complaint and use of force training needs, and continuing to collaborate with the Training Advisory Council.

- **2019 Q4 Update:** During this time frame, the Training Division began to collect some information in preparation for the 2019 Training Needs Assessment and worked on refining training plans. This work included conducting literature reviews on law enforcement training, collecting force and unit specific training needs, meeting with lead instructors regarding training needs and planning priorities, conducting literature reviews on law enforcement training, meeting with the Independent Police Review Director and Internal Affairs Lieutenant regarding misconduct complaint and use of force training needs, and continuing to collaborate with the Training Advisory Council. The Training Division also refined the Bureau’s 2019 Training Plan and the 3-year Strategic Training Plan.

- **2019 Q3 Update:** During Q3, the Training Division continued to collect information for the 2019 training needs assessment and refined the 2019 training plans. This work included, but is not limited to, analyzing member feedback on future training needs from 2018 survey items, obtaining information from the City Attorney’s Office regarding Federal law changes, meeting with the Professional Standards Division Commander and DOJ Coordinator regarding DOJ related training needs, collecting feedback from unit managers regarding their training needs, and continuing to collaborate with the Training Advisory Council.

- **2019 Q2 Update:** During Q2, more information was gleaned for inclusion in the 2019 Training Needs Assessment as staff began to compose a draft of it. They also engaged in the ongoing review of the 2019 training plans. This work included, but is not limited to, conducting literature reviews on law enforcement training, reviewing force and force audit reports for implications for training, collecting 2018 officer injury statistics from Fire and Police Disability and Retirement, collecting updates on case law summaries from the City Attorney’s Office, continuing to collaborate with the Training Advisory Council, collaborating with the Detectives Division to refine training plans and build curriculum for the 2019 Detectives In-service, and meeting with the Chief’s Office to further refine the training plans for the 2019 Command In-service.

- **2019 Q1 Update:** During Q1, the Training Division continued to collect information for the 2019 training needs assessment and refined the 2019 training plans. This work included, but is not limited to, conducting literature reviews on law enforcement training, reviewing force and force audit reports for implications for training, collecting 2018 officer injury statistics from Fire and Police Disability and Retirement, collecting updates on case law summaries from the City Attorney’s Office, continuing to collaborate with the Training Advisory Council, collaborating with the Detectives Division to refine training plans and build curriculum for the 2019 Detectives In-service, and meeting with the Chief’s Office to further refine the training plans for the 2019 Command In-service.

- **2019 Q3 Update:** In the third quarter, Training staff finalized the 2019 training needs assessment, refined the 2019 training plans, and worked on the 2020 training plans. This work included, but is not limited to, meeting with the Force Inspector and Force Audit Team to discuss force related training needs, meeting with Internal Affairs for feedback on training needs, meeting with the Portland Police Bureau’s Fire and Police Disability liaisons regarding officer injury related training needs, obtaining and reviewing additional feedback from precinct and unit managers on future training needs, reviewing literature pertaining to best practices and law enforcement training.
During the fourth quarter, the Training Division began collecting information for the 2020 needs assessment and continued to work on planning for 2020 training. This work included reviewing After Action reports, attending external trainings to research the latest trends and best practices in law enforcement training, continuing to work with the Training Advisory Council, finalizing the training plans for 2020 All-Sworn In-service, continuing to work on strategic training planning for In-service, and began compiling the 2020 Portland Police Bureau annual training plan report.

During this quarter, the Training Division continued collecting information for the 2020 needs assessment, planning Supervisor and Command level trainings for 2020, and compiling the 2020 training plan report. The work on the needs assessment included reviewing After Action reports, conducting literature research on the latest trends and best practices in law enforcement training, continuing to work with the Training Advisory Council, and coordinating with other Divisions to obtain reports and/or other information pertaining to pursuits, collisions, and use of force investigation trends. The Training Division finished compiling the draft 2020 Portland Police Bureau Annual Training Plan report. A copy of this report is provided in the attached documentation for this action item. The Training Division is planning to have the Training Advisory Council (TAC) review this document and have an opportunity to provide input. This may lead to minor changes being made to this report, however, the overall training plans will remain consistent with the version submitted for this quarter. After the TAC has reviewed and provided input on the report, the final version will be posted on the Training Division’s website.

In the second quarter, the Training Division continued its efforts to collect information for the 2020 needs assessment and refined 2020 training plans as needed. This work included, but was not limited to, reviewing Use of Force and Force Auditing reports, conducting literature research on the latest trends and best practices in law enforcement training, reviewing the 2019 Pursuit and Collision reports, obtaining and reviewing the Fire and Police Disability and Retirement’s 2019 officer injury report, reviewing the 2019 Independent Police Review report, obtaining and reviewing the 2019 Oregon Legislation Highlights report by the Oregon State Bar, reviewing the DHM’s 2019 City of Portland Community Policing report, reviewing the National Police Foundation’s 2019 contact survey results, and continuing to work with the Training Advisory Council.

For the third quarter, the Training Division finalized the 2020 training needs assessment, finalized the 2020 Supervisors In-service training plans, and worked on the 2021 training plan. This work included, but is not limited to, obtaining feedback from the Force Inspector and Force Audit Team regarding force related training needs, obtaining feedback from Internal Affairs on training needs, obtaining and reviewing additional feedback from precinct and unit managers on future training needs, reviewing literature pertaining to best practices and law enforcement training trends, obtaining and reviewing additional updates in laws pertaining to Oregon law enforcement, reviewing OIR and other recommendations from external stakeholders, reviewing case law summaries from the City Attorney’s Office, reviewing the Community Engagement Plan, obtaining information from the PPB policy team on directive changes and related training needs, reviewing the 2019 Independent Police Review (IPR) Annual Report, obtaining feedback from the IPR Director regarding training needs, meeting with lead instructors to collect information pertaining to training needs and priorities, obtaining feedback from the Behavioral Health Unit regarding training needs for crisis response related training needs, and continuing to collaborate with the Training Advisory Council.

During the fourth quarter, the Training Division finalized the 2021 training plan, began gathering information for the 2021 needs assessment, and refined 2021 training plans as needed. This work included, but is not limited to, reviewing After Actions for applicability to future training needs, reviewing literature pertaining to best practices and law enforcement training trends, obtaining and reviewing additional updates in laws pertaining to Oregon law enforcement, obtaining case law summaries from the City Attorney’s Office, obtaining information from the Portland Police Bureau’s (PPB) policy team on directive changes, working with the PPB’s Equity & Inclusion Office and the Portland Committee on Community-Engaged Policing on planning a series of equity trainings, continuing to collaborate with the Training Advisory Council, and finalizing the 2021 Annual Training Plan report.

During this quarter, the Training Division continued to gather information for the 2021 training needs assessment, and to work on and refine 2021 training plan as needed. A brief summary of the work on this includes:

- Needs Assessment
- Applied Use of Force
- The Training Division reviewed After Action Reports for applications to future training needs.
The Training Division obtained the 2020 Force Summary and Force Audit reports, as well as an update on use of force trend statistics from the Force Audit Team.

- Changes in Oregon and Federal Law
  - The Training Division continued to monitor changes to state and federal laws to inform training needs including obtaining the Oregon State Bar’s 2020 Oregon Legislation Highlights report.

- Trends in Hazards and Officer Safety Issues
  - The Training Division obtained the 2020 injury trends statistics from FPDR.

- Misconduct Complaints
  - The Training Division obtained complaint and commendation statistics from IPR for time comparison analyses.

- Research reflecting best practices and the latest in law enforcement trends
  - The Training Division continued to conduct literature reviews on research pertaining to law enforcement training.

- Changes in PPB Policy
  - The Training Division management coordinates with the PPB policy team to remain informed about any changes to PPB directive changes that implicate future training needs and planning.

- Police Vehicle Operations
  - The Training Division obtained the 2020 Pursuit Report from the Strategic Services Division.

- Input from the community and other external stakeholders
  - The Training Division continued its collaboration with the Training Advisory Council (TAC). For a full update on the involvement with TAC, see the quarterly update for Action Item 87.
  - The Training Division also worked with PPB’s Equity & Inclusion Office and PCCEP on planning a series of trainings on equity.
  - The Training Division is exploring a time series analysis of the DHM’s City of Portland Community Policing Survey results.

Training Planning

In this quarter, the Training Division continued to refine the 2021 training plans as needed and update the strategic training plans.
Department of Justice Tasks / Quarterly Update Report

Task Description
Process for collection, analysis, and review of training data

Task Requirements: Per DOJ - PPB shall develop and implement a process that provides for the collection, analysis, and review of data regarding the effectiveness of training for the purpose of improving future instruction, course quality, and curriculum. These evaluations shall measure and document student satisfaction with the training received; student learning as a result of training; and the extent to which program graduates are applying the knowledge and skills acquired in training to their jobs. This audit shall be reported to the Training Division Manager and shall include student evaluations of the program and the instructor.

Status: Actively in Process

Action Steps:
1. Training Division will utilize an evaluation process developed by Dr. Kirkpatrick to plan and develop training evaluation process.
2. Pilot training evaluation (through survey) with ECIT training evaluation.
3. Training Division is vetting a list of core competencies for new recruit training.
4. Training Division will develop an evaluation plan around training for new recruits.
5. Training Division will use the Federal Law Enforcement Training Center (FLETC) scoring model for some scenario based training.
6. Training will prioritize evaluation of the trainings that are specifically required or relevant to this Agreement.

Task Date Completed:

Evidence of Completion:
1. Draft process for evaluating the effectiveness of training. 10/8/13
2. ECIT training survey
3. Training Development Analyst position announcement
4. Training Development Analyst (TDA) description

Received DOJ Approval?

Approval

Status Note:

Friday, May 7, 2021

2014 Q1 Update: Training analyst has developed and implemented new survey and process for measuring training's effectiveness.

2014 Q2 Update: Training analyst utilized new survey in the course of the April 2014 ECIT training program.

2014 Q3 Update: Training analyst met with BHU re: ECIT follow up survey and sent it out in September. She also worked on Level 4 of the evaluation process re: organizational goals. For the 2014 In-Service, she began data analysis of the 2 surveys and discussed initial findings with training staff. Finally, began designing the evaluation for the Advanced Academy which will commence in October, 2014.

2014 Q4 Update: In this quarter, the Training Division continued to work on the Enhanced Crisis Intervention Team (ECIT) and 2014 In-service training evaluations, and began developing and implementing an evaluation process for the 2014 Supervisors EIS training. This work included:
- Collecting and preparing data for the 2014 ECIT training program evaluation report.
- Developing a survey for those working in mental health facilities, regarding their experiences and observations of police services.
- Analysis of the 2014 In-service feedback survey and the integration of portions of this survey into the 2014 Needs Assessment.
- The development and implementation of training evaluation for the 2014 Supervisors EIS training.

2015 Q1 Update: During this time frame, the Training Division worked on the 2014 Enhanced Crisis Intervention Team (ECIT) training evaluation report, the evaluation process for the 2014 Supervisors EIS training, and the Advanced Academy training program evaluation. This work included:
- Analyzing data pertaining to the 2014 ECIT training program evaluation report.
- Meeting with program coordinators and instructors of the ECIT training to obtain additional information on in-class learning assessments, feedback from the Behavioral Health Advisory Committee, and classroom observations.
- Preparing several sections of the 2014 ECIT training evaluation report.
- Continuing to work with the Professional Standards Division in the development of the EIS training evaluation process.
- Data analysis and reporting of survey data pertaining to the Advanced Academy training program evaluation.
2015 Q2 Update: During this quarter, the Training Division completed the 2014 Enhanced Crisis Intervention Team (ECIT) training evaluation report and began the process of evaluating the 2015 In-service training. This work included:

• Analyzing data pertaining to the 2014 ECIT training program evaluation report.
• Finalizing the 2014 ECIT Training Evaluation Report.
• Developing and distributing the 2015 In-service feedback surveys.

2015 Q3 Update: The following provides a brief summary of training evaluation activities during July through September 2015. This summary does not include actions pertaining to in-class learning assessments, as those are provided in a separate quarterly report.

Progress update on: Enhanced Crisis Intervention Training (ECIT) Evaluation
- The Training Division Analyst, ECIT program coordinators, and some of the lead instructors for the ECIT training met in September to further discuss the ECIT training evaluation findings, changes to the ECIT training curriculum, and future training evaluation plans.
- Level 4 evaluation for the ECIT training: This includes an annual examination of several bureau level measurements related to the goals of the ECIT program, such as the utilization of health facilities and community based mental health services, disengagement and other techniques for increasing de-escalation, and the Behavioral Health Unit's Electronic Referral System. An examination of use of force and the use of arrests during ECIT calls is also conducted. This evaluation began in 2014 and will continue. This is to monitor how well this program, and potentially other factors, are meeting organizational level goals related to this training, as well as monitoring on-the-job application of these resources and techniques.
  
  An additional component of the level 4 measures in the ECIT evaluation plan is the collection of feedback from local mental health facilities and Project Respond workers. During this timeframe, the Training Division and Behavioral Health Unit Analyst continued to work on the development of this portion of the evaluation process. This included several meetings with Dr. Yves Labissiere. The planned methodology for this portion of the evaluation includes interviews and surveys of mental health professionals.
- Next Steps: prepare changes to the evaluation for the upcoming ECIT training and continue to pursue obtaining feedback from local mental health professionals.

2015 In-Service Evaluation

The Training Division continued distribution of the feedback surveys for the 2015 In-service. This data will be analyzed and processed at the end of in-service. At that time, additional feedback will be collected from lead instructors and program coordinators. Some of the on-the-job outcome measures related to in-service training are obtained from the ECIT training evaluation and the needs assessment process. Additional measurements will be developed as staffing capacity increases.

2015 Advanced Academy Evaluation

The 2015 Advanced Academy started on July 16th and operates until October 18th, 2015. During this quarter, the Training Division created, distributed, and analyzed weekly student feedback surveys. As noted above, information pertaining to the in-class learning assessments can be found in a separate document.

The next steps are to continue to analyze the feedback results, including comparisons with the previous cohort. The Training Division Analyst will then meet with lead instructors and program coordinators in order to obtain further feedback. This information will be combined with the findings on the in-class learning assessments for identifying the next steps for enhancing the program.

2015 Q4 Update: The Training Division has been tasked with conducting training evaluation for the purpose of improving future instruction, course quality, and curriculum. The Training Division currently utilizes multiple research methodologies within the Kirkpatrick model of training evaluation. This model examines the training event itself, student learning, on-the-job application and associated barriers, organizational reinforcers, and organizational goals. Some of the methodologies being implemented by the Training Division are in-class surveys, observation, verbal student feedback, instructor observation, in-class learning assessments such as written and skills tests and skills application in scenarios, follow-up student surveys, feedback from program coordinators and supervisors regarding on-the-job application, and data pertaining to on-the-job outcomes (e.g. data pertaining to the use of force, and the utilization of mental health services, de-escalation techniques, etc.).
During this time frame, the Training Division staff continued to progress in their evaluation of the Enhanced Crisis Intervention Team training, the 2015 In-service training, and the Advanced Academy training program. This work includes, but is not limited to, collecting and analyzing student survey results for the 2015 Enhanced Crisis Intervention Team (ECIT) training; collecting feedback regarding the 2015 ECIT training from the Behavioral Health Unit, instructors, and the Behavioral Health Unit’s Advisory Committee; continuing to collect feedback from In-service attendees; analyzing the 2015-1 Advanced Academy survey results; collecting feedback regarding the Advanced Academy training from instructors, program managers, and curriculum development specialists; and determining changes for future Advanced Academies.

2016 Q1 Update: During this quarter, the Training Division staff continued to progress in their evaluation of the Enhanced Crisis Intervention Team (ECIT) training, the 2015 In-service training, and the Advanced Academy training program. This work includes, but is not limited to, analyzing the initial ECIT training evaluation results, meeting with Dr. Watson (via phone) regarding ECIT training evaluation measures, analyzing data pertaining to on-the-job outcomes of the ECIT training, analyzing and documenting in-class learning assessment results, and conducting evaluation for the 2016-1 Advanced Academy.

2016 Q2 Update: During this time frame, the Training Division staff continued its efforts in their evaluation of the Enhanced Crisis Intervention Team training, the 2015 In-service training, and the Advanced Academy training program. This work includes, but is not limited to, refining and distributing the ECIT follow-up survey to 2015 ECIT training attendees, working with the Behavioral Health Unit to analyze on-the-job outcomes pertaining to the ECIT program, presenting preliminary ECIT evaluation findings and receiving feedback from the Behavioral Health Unit Advisory Committee, finalizing the ECIT learning assessment results, analyzing data pertaining to In-service and developing a 2015 In-Service Evaluation Report (in attached documents), finalizing the 2016 Advanced Academy change document (in attached documents), analyzing the 2016-1 Advanced Academy student survey results, collecting and analyzing in-class learning assessments for the Advanced Academy, collecting feedback on the 2016-1 Advanced Academy training program managers and lead instructors, and compiling the 2016-1 Advanced Academy evaluation results for the program managers.

2016 Q3 Update: In the third quarter, the Training Division continued to refine and expand upon its evaluation work. This included, but is not limited to, beginning the level four research for the Enhanced Crisis Intervention Team (ECIT) training evaluation, developing online learning assessments for new directives, and refining the training evaluation surveys based on the COCL’s recommendations and other sources. In addition, the 2015 In-service evaluation report and 2015 ECIT evaluation report were completed during this timeframe.

2016 Q4 Update: During this quarter, the Training Division continued to refine and expand upon the training evaluation processes and analyses. This included, but is not limited to, continuing the Level 4 research for the Enhanced Crisis Intervention Team (ECIT) training evaluation, delivering four online “knowledge checks” for new directives, conducting evaluation for the 2016 In-service, following up on the EIS training evaluation, and enhancing the ECIT outcome analyses based on the COCL’s recommendations. In addition, the Training Division began transitioning the training learning assessment tasks (which includes competency-based evaluations) to other staff members.

2017 Q1 Update: During this quarter, the Training Division continued its efforts to improve upon the training evaluation processes and analyses. This included, but is not limited to, continuing the Level 3 and 4 research for the Enhanced Crisis Intervention Team (ECIT) training evaluation with special focus on Level 4 with the Division's contract work with Dr. Yves Labissiere; delivering online learning assessments for new directives; assessing competency-based testing instruments; analyzing and evaluating the 2016 In-service which was compiled into a summary report; conducting evaluation of the 2017-1 Advanced Academy; initiating evaluation of the EIS supervisor's training at 2017 In-Service with a student feedback survey; and meeting with Dr. Amy Watson regarding the ECIT evaluation process and outcomes.

Four directives enacted this quarter were accompanied by "knowledge check" learning assessment questions. They included:
• 345.00 Employee Information System (EIS)
• 660.10 Property and Evidence Procedures
• 720.00 SERT and CNT Use
• 1221.00 Smart Phone Issuance and Usage

The questions were developed by the Strategic Services Division in partnership with subject matter experts and the Training Division. Sworn members were required to answer these questions before electronically acknowledging that they had read and
understood the particular directive. Strategic Services Division notifies the appropriate RU if members fail to do the assessment and electronically acknowledge the directive.

2017 Q2 Update: During 2017 Q2, the Training Division continued to refine and expand upon the training evaluation processes and analyses. This included, but is not limited to, continuing the Level 4 research for the Enhanced Crisis Intervention Team (ECIT) training evaluation, delivering online learning assessments for new directives, updating and restructuring the written competency-based tests for the Law and Police Vehicle Operations programs, creating student feedback measurement instruments for the 2017 In-service utilizing recommendations from the OCCL’s technical assistance reports (including the ICES Item Catalog), analyzing the 2017-1 Advanced Academy student feedback, obtaining feedback from lead instructors and program managers regarding the 2017-1 Advanced Academy, and providing the final 2017-1 Advanced Academy evaluation findings to program managers.

During this quarter, six Directives were released. Five included knowledge check learning assessment questions. The questions were developed by Strategic Services in partnership with subject matter experts and the Training Division. Sworn members are required to answer knowledge check questions before electronically acknowledging certain directives. Strategic Services notifies the appropriate RU if members fail to do the assessment and electronically acknowledge the directive.

Second quarter 2017 Directives:
- 850.21 Peace Officer Custody (Civil)
  - Acknowledgement Window: 05/02/2017 - 06/01/2017
- 850.22 Police Response to Mental Health Director's Holds and Elopement
  - Acknowledgement Window: 05/02/2017 - 06/01/2017
- 850.25 Police Response to Mental Health Facilities
  - Acknowledgement Window: 05/02/2017 - 06/01/2017
- 631.70 Investigation of Animal Problems
  - Acknowledgement Window: 06/06/2017 - 07/06/2017
- 1025.00 Police Operations at TSA-Governed Airport Facilities
  - Acknowledgement Window: 06/06/2017 - 07/06/2017
- 1210.00 Building Maintenance, Job Requests
  - Acknowledgement Window: 04/20/2017 - 05/20/2017

2017 Q3 Update: During the third quarter, the Training Division continued to develop the training evaluation processes, particularly for In-service and the Advanced Academy. This included continuing to refine the survey instruments based on the COCL feedback and other research, developing various additional formal learning assessments for In-service in partnership with the COCL, refining competency-based tests for the Advanced Academy, and compiling a program modification report for the Advanced Academy. In addition, more work was conducted on the higher level outcomes for the Enhanced Crisis Intervention Team (ECIT) evaluation. This included working with the DOJ and COCL to formulate an agreed upon analysis plan of ECIT outcomes and continuing to research the intersection of law enforcement and mental health with Dr. Yves Labissiere.

In addition, during this time frame nine directives were released. On two of the directives, 630.05 and 1010.00, the Training Division worked in partnership with Strategic Services and subject matter experts to develop knowledge check learning assessment questions. Sworn members are required to answer knowledge check questions before electronically acknowledging certain directives. Strategic Services notifies the appropriate RU if members fail to do the assessment and electronically acknowledge the directive.

2017 Q4 Update: During Q4, the Training Division continued to develop the training evaluation processes. This included continuing to refine the survey instruments based on the COCL feedback and other research, refining competency-based tests for the Advanced Academy, compiling the 2017-2 and 2017-3 Advanced Academy evaluation results for management, conducting a policy test during the 2017-
In-service, and conducting focus groups as a part of the ECIT evaluation process. In addition, more work was conducted on the higher level outcomes for the Enhanced Crisis Intervention Team (ECIT) evaluation. This included working with the DOJ and COCL to formulate an agreed upon analysis plan of ECIT outcomes and continuing other portions of the intersection of law enforcement and mental health research with Dr. Yves Labissiere.

2018 Q1 Update: in the first quarter, the Training Division continued to refine and expand upon the training evaluation processes and analyses. This included, but is not limited to, continuing the Level 4 research for the Enhanced Crisis Intervention Team (ECIT) training evaluation, developing a survey and test instrument for evaluating the 2018-1 In-service, analyzing survey and learning assessment data from the 2017-1 and 2017-2 In-services, conducting evaluation for the 2018-1 and 2018-2 Advanced Academies, and evaluating the 2018 ECIT Refresher sessions.

2018 Q2 Update: During this quarter, the Training Division continued to develop the training evaluation processes. This included refining test instruments based on the COCL feedback, delivering surveys and competency-based tests for the 2018-1 and 2018-2 Advanced Academies, compiling the 2018-1 and 2018-2 Advanced Academy evaluation results for management, finalizing the 2017-2 In-service Report, creating and delivering survey and test instruments to the 2018-2 In-service and 2018 Supervisor’s In-service, and initiating preparation for the 2018 ECIT training.

2018 Q3 Update: During 2018 Q3, the Training Division continued to enhance the training evaluation processes. This included refining the survey and test instruments based on the COCL feedback and other research, conducting Advanced Academy survey and test evaluation, compiling the evaluation results for the 2018-2 In-service and 2018 Supervisors In-service training, creating and distributing survey and testing evaluation instruments for the 2018-3 In-service, conducting evaluation for the 2018 ECIT training, and refining the evaluation feedback loop processes for the Advanced Academy, In-service, Supervisors In-service, and ECIT training programs.

2018 Q4 Update: During Q4, the Training Division continued to develop the training evaluation processes. This included, but was not limited to, continuing to deliver surveys and competency-based testing to the 2018-3 and 2018-4 Advanced Academies, compiling the 2018-3 and 2018-4 Advanced Academy evaluation results for management, conducting a knowledge test and scenario performance measurements during the 2018-3 In-service, compiling evaluation results for the 2018 Supervisors In-service, re-establishing the Enhanced Crisis Intervention Team training evaluation process, and compiling the 2018 Enhanced Crisis Intervention Team training evaluation report.

2019 Q1 Update: During the first quarter of 2019, the Training Division continued to improve the training evaluation processes. This included continuing to refine the survey instruments based on the COCL feedback and other research, refining the surveys for the 2019-1 Advanced Academy, compiling the 2018-3 and 2018-4 Advanced Academy evaluation results for management, analyzing the 2018-3 and 2018-4 Advanced Academy test data, creating and distributing a survey and knowledge test for the 2019 Supervisors In-service, conducting analyses on the 2018-3 In-service survey and test data, and finalizing the 2018-2 In-service report.

2019 Q2 Update: During Q2, the Training Division continued to develop the training evaluation processes. This included refining the surveys for the 2019-1 Advanced Academy, compiling the 2019-1 Advanced Academy evaluation results for management, analyzing the 2019-1 Advanced Academy test data, conducting the final analyses of the 2019 Supervisors In-service survey and knowledge test, finalizing the 2018-3 In-service report, and conducting additional Enhanced Crisis Intervention Team evaluation work pertaining to utilizing disengagement with a plan.

2019 Q3 Update: During the third quarter, the Training Division continued to implement its training evaluation processes. The analysts finalized the surveys for the 2019-2 Advanced Academy, compiled the 2019-2 Advanced Academy evaluation results for management and lead instructors, analyzed the 2019-2 Advanced Academy test data, completed the 2019 Supervisors In-service report, prepared and distributed survey and learning assessment instruments for the 2019 In-service, and prepared for the 2019 Enhanced Crisis Intervention Team training evaluation process.

2019 Q4 Update: During Q4, the Training Division continued its work on the training evaluation processes. This included continuing to distribute the surveys for the 2019-2 and 2019-3 Advanced Academies, compiling the 2019-2 and 2019-3 Advanced Academy evaluation results for management and lead instructors, analyzing the 2019-2 and 2019-3 Advanced Academy test data, debriefing the Advanced Academy evaluation results, distributing the 2019 In-service evaluation instruments (surveys, knowledge test, scenario measurements) during the 2019 In-service sessions, compiling the 2019 In-service evaluation results for management and lead instructors, distributing the 2019 ECIT evaluation instruments (surveys, and knowledge test) to the 2019 ECIT training attendees.
2020 Q1 Update: During this quarter, the Training Division continued to implement the training evaluation processes. This included continuing to compile the 2019-3 Advanced Academy evaluation results for management and lead instructors, creating written summaries of the 2019-3 Advanced Academy test data, debriefing the Advanced Academy evaluation results, updating the test instruments for the 2020-1 Advanced Academy, conducting the final analyses of the 2019 In-service evaluation instruments and completing the 2019 In-service evaluation report, developing and distributing the 2020 In-service evaluation instruments (feedback surveys, a knowledge test, and scenario measurements), and compiling 2020 In-service preliminary evaluation results for management and lead instructors.

2020 Q2 Update: During the second quarter, the Training Division continued to implement the training evaluation processes. This included continuing to distribute the survey and test instruments to the 2020-1 Advanced Academy, compiling the 2020-1 Advanced Academy evaluation results for management and lead instructors, updating the Advanced Academy test instruments, continuing to distribute the 2020 In-service test, compiling 2020 In-service preliminary evaluation results for management and lead instructors, conducting the final analyses of the 2020 In-service evaluation surveys, and developing the 2020 Enhanced Crisis Intervention Team In-service training evaluation instruments.

2020 Q3 Update: The Training Division continued to implement the training evaluation processes in this quarter. This included continuing to distribute the survey and test instruments to the 2020-1 and 2020-2 Advanced Academy, compiling the 2020-1 and 2020-2 Advanced Academy evaluation results for management and lead instructors, conducting 2020-1 Advanced Academy evaluation debriefs with lead instructors, updating the Advanced Academy test instruments, continuing to distribute the 2020 In-service test, analyzing the 2020 In-service evaluation data, conducting 2020 In-service evaluation debriefs with management and lead instructors, compiling the 2020 In-service evaluation report, distributing the 2019 Enhanced Crisis Intervention Team (ECIT) training follow-up survey, distributing the 2020 ECIT In-service evaluation instruments, and compiling 2020 ECIT In-service evaluation results for program managers.

2020 Q4 Update: During this quarter, the Training Division continued to conduct the training evaluation processes. This included distributing the survey and test instruments to the 2020-3 Advanced Academy, compiling the 2020-2 Advanced Academy evaluation results for management and lead instructors, conducting 2020-2 Advanced Academy evaluation debriefs with lead instructors, compiling the 2020 In-service evaluation report, creating the evaluation instruments for the 2021 In-service and the 2021 January online In-service trainings, compiling the 2019 Enhanced Crisis Intervention Team (ECIT) training report, distributing a survey and test for the online 2020 Supervisors In-service, and compiling preliminary 2020 Supervisors In-service evaluation results for program managers.

2021 Q1 Update: During the first quarter, the Training Division continued to employ the training evaluation processes. This included continuing to compile the 2020-3 Advanced Academy evaluation results for management and lead instructors, conducting 2020-3 Advanced Academy evaluation debriefs with lead instructors, conducting a more extensive review of the DPSST’s current Basic Academy curriculum, distributing the evaluation instruments for the 2021 In-service and online In-service trainings, compiling preliminary 2021 In-service and online In-service training evaluation results for program managers and lead instructors, compiling the 2019 Enhanced Crisis Intervention Team (ECIT) training report, and summarizing the final 2020 Supervisors In-service evaluation results for program managers.
Task Description
Semi-annual review of officer training records

Task Requirements: Each officer’s immediate supervisor shall review the database for the officers under his/her command at least semi-annually.

Status Actively in Process

Action Steps:
1. Training will ensure data is available to supervisors.
2. Chief's Office will update DIR 120.00 for Semi-annual inspections by Sergeants to include the requirement to check training records.
3. Sergeants will document the review of training records in semi-annual evaluations of their subordinates.

Task Date Completed: 

Evidence of Completion:
1. Draft Directive 120.00
2. Semi-annual report on training delivered (located in folder #82)

Status Note:
2014 Q1 Update: Semi-annual inspection by supervisors was completed by January 15, 2014.
2014 Q2 Update: Supervisor review of training database not due this quarter
2014 Q3 Update: Directive 120.00 with its revision to require all supervisors to review their members’ training record as part of the mandated semi-annual inspection was posted for the 30 day public comment period. It is now in Executive reconciliation phase. The semi-annual reviews were completed by mid-July. The training requirement was added to the electronic form so that info was included even though revised Directive not yet enacted.
2014 Q4 Update: Directive 120.00 was enacted on December 4, 2014. The mandatory supervisor review of training database was not due this quarter.
2015 Q1 Update: All of the semi-annual inspections by supervisors were submitted to the Chief's office by February 5, 2015. The form includes acknowledgement of the training records review requirement.
2015 Q2 Update: The semi-annual review of training records was not due this quarter.
2015 Q3 Update: The frequency of inspections by supervisors of which the training records review was a part was changed by CHO from semi-annual to annual. Thus a new protocol was necessary to meet the semi-annual requirement of this item. The Training Division keeps the training records of each sworn officer. Thus it was charged with developing this new procedure. It is anticipated that this requirement will now be tied to the issuance of the training report referenced in #82 and will be fulfilled in the fourth quarter of 2015.
2015 Q4 Update: While attempting to develop the new protocol for this item as noted last quarter, some issues were identified that impede the proposed solution. Supervisors can check for members training hours by using the snapshot program. Snapshot shows the total hours of training the member has received for a calendar year. However, the state uses a three year cycle for a member to receive 84 total hours of training and 8 hours a year must be for use of force training. DPSST requires all training must be reported by December 31 of each year, but not all PPB members are on the same cycle. For example, only 42 PPB members' training cycle ends on December 31, 2016. Snapshot does not show the end date of the members three year cycle and it does not distinguish what hours are considered to be “use of force” training. Therefore a supervisor cannot adequately tell if a member is compliant by just looking at snapshot alone.

The second issue is the Training Division is the only entity within the Bureau that reports to DPPST and PPB is typically reporting our members' training hours up until the deadline. DPSST requires all training within a calendar year must be reported within the same calendar year. For example, if a member was to train on December 31, those hours would need to be reported to DPSST by the end of the day of December 31 in order to receive credit.

The third issue is that DPSST then has 30 days before to report back to PPB on the hours. This does not occur before the close of
Thus PPB has designed an interim solution until the new Learning Management System is implemented. The Training Division runs a certification compliance report and the report is given to the Lieutenant who oversees In-service. Currently with the configuration of In-service on the back half of the year, there may be several members who are in need of training to retain their certification. The Lt. ensures all members on the report are signed up to attend In-service and typically the hours received during In-service keeps a member well within the hours needed for certification. If a member is out of compliance, the Lt. notifies the command of the effected member and works with the RU to ensure the member receives the training hours needed. If the member is off work, the Lt. collaborates with the Personnel Lt. to ensure the member receives the needed training upon their return to work.

2016 Q1 Update: During Q1 two employees returned to work and were assigned to the Training Division due to their absence of longer than 180 days. The two officers received instruction from several of the 2015 Inservice Courses.

The Training Division did not need to run a training hour compliance report for Q1 as the maintenance period ends each year on December 31. PPB will be delivering 2016 Inservice during Q3 and Q4 and the sign up has not been established.

The report compiled by DPSST for training non-compliance was not completed during Q1 and we expect completion during Q2.

2016 Q2 Update: The DPSST noncompliance report was received this quarter. Those listed as non-compliant in one or more areas (i.e. Force; CPR) were addressed. All members were brought into compliance except the two who are both on LOS and have not made it back to work. They will be assigned to Training upon their return as they both have been gone longer than 180 days. All other members are in compliance with DPSST for 84 hours of training within the three year period of 2013 to 2015.

2016 Q3 Update: The semi-annual review of training records was not due this quarter.

2016 Q4 Update: The Training Division conducted a review of training records to ensure all members whose three-year maintenance cycle ended on December 31, 2016 attended enough training to remain certified by the State of Oregon. The Training Division also ensured all members received 8 hours of firearms or use of force training per year. Only one member required additional training hours; however after accounting for a change in that member's maintenance period due to a leave of service, he exceeded the requirements.

2017 Q1 Update: The semi-annual review of training records was not due this quarter. However, the Training Division sent a note to supervisors alerting them of any officers currently short of training hours so that the issue can be rectified.

2017 Q2 Update: The Training Division is still checking that members are compliant with DPSST maintenance standards and then reporting to members RU managers when members are not in compliance. The Training Division sent a report to all RU managers in 2017Q1. This report was not run during 2017Q2 and will be run during 2017Q3.

2017 Q3 Update: The Training Division is responsible for the tracking of members' training records and reporting of training attended to DPSST. The Training Division did not receive the DPSST compliance report until October 4, 2017. The Training Division will report on steps taken for compliance with 81b in the Q4 report.

2017 Q4 Update: The Portland Police Bureau received the Three Year Police Maintenance Report from the Oregon Department of Public Safety Standards and Training DPSST) on October 4, 2017. The report identified several PPB officers that potentially lacked proper training hours for their maintenance cycle. As1 Val Crumley from the Training Division worked with Marsha Morin, DPSST Criminal Justice Certifications Manager to ensure each officer was in compliance.

At the conclusion, the only PPB officers not currently in compliance with DPSST are two officers who are both currently on LOA.

2018 Q1 Update: A spreadsheet was emailed to RU Managers on 2/15/2018. It lists all of the external training members received during the calendar year 2017. The RU Managers were instructed to distribute the spreadsheet to their RU’s immediate supervisors in order to conduct a review of their subordinates’ external training and to use snapshot to review attendance at internal training.

2018 Q2 Update: The Training Division received the Three Year Maintenance Report as well as the Criminal Justice Maintenance Training Requirement and the First Aid/CPR Tracking reports from DPSST on June 26, 2018 and they will be reviewed and reported on in
The Training Division received three separate documents from the Oregon Department of Safety Standards and Training (DPSST) which provided an update on PPB member’s 3 year maintenance cycle. The Training Division reports training to DPSST on a regular basis. The Training Division reasonably projects anticipated training which has not been reported to DPSST when reviewing members records. The Training Division will continue to monitor PPB officers during the 2018Q4 and notify RU managers if members are not completing their required trainings.

The RU managers of those with hours outstanding for certification were notified by email of training hours needed in order to remain certified. Those members have until December 31, 2018 to complete the needed training. All other members meet the minimum requirements set forth by DPSST to maintain certification.

Starting in the fourth quarter of 2018, each officer’s immediate supervisor will have the ability to review training records in the PPB LMS. However, the Training Division will continue to monitor officers training hours for purposes of state certification.

The Training Division received numerous reports again this quarter from the Oregon Department of Safety Standards and Training (DPSST) which provided updates on PPB members’ 3 year maintenance and annual training cycles completion status. The Training Division updates members and their RU managers as to who is out of compliance and what steps needed to be completed to become compliant.

In addition, the LMS has been updated so that supervisors are able to run transcript reports on the members they supervise and they were notified of that capability by email.
• Sergeants in a shift can view all officer transcripts in their shift.
• Lieutenants can view all sergeant and officer transcripts in their RU.
• Captains can view all officer, sergeant, and lieutenant transcripts in their RU.
• Commanders can view all officer, sergeant, lieutenant, and captain transcripts in their RU.
• CHO sworn personnel can view all bureau transcripts.

The Transcript Report will show the following information:
• Classes a member has completed (if reported to the Training Division)
• External training (if reported to the Training Division)
• Videos watched
• Legal Updates and Tips & Techniques read
• Directives and Knowledge Checks completed
• Weapons Qualifications completed

On January 8, 2019, the Training Division received the attached update of members 3 year maintenance and annual training. Members who were not in compliance and their RU Managers were notified to complete the required trainings hours in order to maintain their certification. The Training Division worked with the Personnel Division to properly report members who cannot perform their duties to DPSST to extend their maintenance period.

The LMS has been updated so that supervisors are able to run transcript reports on the members they supervise.
• Sergeants in a shift can view all officer transcripts in their shift.
• Lieutenants can view all sergeant and officer transcripts in their RU.
• Captains can view all officer, sergeant, and lieutenant transcripts in their RU.
• Commanders can view all officer, sergeant, lieutenant, and captain transcripts in their RU.
• CHO sworn personnel can view all bureau transcripts.

The Transcript Report will show the following information:
2019 Q2 Update: The Training Division received the three year training maintenance cycle memo this quarter from the Oregon Department of Safety Standards and Training (DPSST). This document provides updates on PPB members' 3 year maintenance and annual training cycles completion status. The Training Division updates members and their RU managers as to who is out of compliance and what steps needed to be completed to become compliant. The Training Division does not anticipate any issues with compliance this quarter.

The LMS has been updated so that supervisors are able to run transcript reports on the members they supervise.

2019 Q3 Update: On September 20, 2019, the Training Division received an update of members' 3 year maintenance and annual training from DPSST. The Training Division is in the process of notifying the RU Managers of members who need to complete the required training hours in order to maintain their certification. The Training Division is working with the Personnel Division to properly report members who cannot perform their duties to DPSST to extend their maintenance period. The Training Division does not anticipate any issues regarding officer compliance with DPSST training requirements.

2019 Q4 Update: On January 16, 2020 the Training Division was notified by the Department of Public Safety Standards and Training that 20 officers/detectives were not in compliance with state mandated firearms training for 2019. The Training Division was able to identify that 17 of these officers had incorrectly been listed.

The Training Division is working with the Personnel Division to properly report the members who cannot perform their duties to DPSST to extend their maintenance period. Additionally, the Training Division was able to rectify an error it had made in reporting the training three detectives had received (they had received firearms/use of force training at the Detective In-Service which had not been reported to the state). This brought those members into compliance.

Per its usual reporting process the Training Division will report on Bureau-wide compliance in 2020Q1 but does not anticipate any issues.

2020 Q1 Update: The COVID-19 Pandemic has created statewide barriers to training. The Training Division continues to work with the state to ensure all PPB officers retain their certification. The Oregon Department of Public Safety Standards and Training (DPSST) has assured state agencies that it will work with them to address training issues resulting from the COVID-19 Pandemic. Despite these limitations, all training continues to be documented in the LMS and remain accessible to supervisors.

2020 Q2 Update: Because of COVID 19, the Training Division continues to work with DPSST to ensure officers will remain compliant when the state resumes training hour requirements

2020 Q3 Update: Since the last update, the Training Division has accomplished the following tasks related to this action item:

- Identified the officers impacted by the training disruption caused by the COVID-19 Pandemic, subsequent budget cuts as well as unprecedented civil unrest and wildfires.
- Developed a training plan to ensure all officers receive mandated training
- Developed additional online training to meet certain requirements (i.e. CIT/Mental Health)
- Began discussions with DPSST on the state reporting requirements to ensure officers' certifications are not impacted by the COVID-19 Pandemic (NOTE: Recognizing the unprecedented nature of the pandemic the DPSST Board passed a resolution allowing for make-up trainings statewide)
- Developed an online supervisor training to ensure all supervisors meet state requirements

Additionally, the LMS still maintains the capability for supervisors to run transcript reports on the members they supervise.

- Sergeants in a shift can view transcripts of all officers on their shift.

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- Lieutenants can view all sergeant and officer transcripts in their RU.
- Captains can view all officer, sergeant, and lieutenant transcripts in their RU.
- Commanders can view all officer, sergeant, lieutenant, and captain transcripts in their RU.
- CHO sworn personnel can view all bureau transcripts.

The Transcript Report will show the following information:

- Classes a member has completed (if reported to the Training Division)
- External training (if reported to the Training Division)
- Videos watched
- Legal Updates and Tips & Techniques read
- Directives and Knowledge Checks completed
- Weapons Qualifications completed

2020 Q4 Update: Since the last update, the Training Division has accomplished the following tasks related to this action item:

- Completed the 2021 Training Plan to formalize the process for rectifying training deficiencies.
- Finalized discussions with DPSST on the state reporting requirements to ensure officers' certifications are not impacted by the COVID-19 Pandemic (NOTE: Recognizing the unprecedented nature of the pandemic the DPSST Board passed a resolution allowing for make-up trainings statewide)
- Developed an online portion for the 2021 In-service.

Additionally, the LMS still maintains the capability for supervisors to run transcript reports on the members they supervise.

- Sergeants in a shift can view transcripts of all officers on their shift.
- Lieutenants can view all sergeant and officer transcripts in their RU.
- Captains can view all officer, sergeant, and lieutenant transcripts in their RU.
- Commanders can view all officer, sergeant, lieutenant, and captain transcripts in their RU.
- CHO sworn personnel can view all bureau transcripts.

The Transcript Report will show the following information:

- Classes a member has completed (if reported to the Training Division)
- External training (if reported to the Training Division)
- Videos watched
- Legal Updates and Tips & Techniques read
- Directives and Knowledge Checks completed
- Weapons Qualifications completed

2021 Q1 Update: The Training Division has accomplished the following tasks related to this action item this quarter:

- Began delivery of 2021 Online In-service Training. This is a new program and is the first time the PPB has delivered this content as part of planned training (due to COVID-19 the PPB delivered a portion of In-service but this was an unplanned response to the COVID-19 Pandemic).
- Completed a selection process for an additional videographer/motion graphic designer to assist in the development of online trainings.

Additionally, the LMS still maintains the capability for supervisors to run transcript reports on the members they supervise.

The Transcript Report will show the following information:

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- Classes a member has completed (if reported to the Training Division)
- External training (if reported to the Training Division)
- Videos watched
- Legal Updates and Tips & Techniques read
- Directives and Knowledge Checks completed
- Weapons Qualifications completed

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
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Task Description: Record administration of Training Division records

Task Requirements: PPB will ensure that the Training Division is electronically tracking, maintaining, and reporting complete and accurate records of current curricula, lesson plans, training delivered, attendance records, and other training materials in a central, commonly-accessible, and organized file system.

NOTE: The following requirement also noted in #81 is assigned to the Compliance Coordinator: Each officer’s immediate supervisor shall review the database for the officers under his/her command at least semi-annually.

Status: Actively in Process

Action Steps:
1. Training will identify how Skills Manager Software maintains training records for all PPB employees
2. Training will have policy that mandates lesson plan development and retention for all training delivered by the Training Division
3. Training will establish access for supervisors to training record to ensure supervisors can fulfill their duties per the requirements of this provision

Evidence of Completion:
1. Course Attendance Summary Reports
2. Semi-annual report on training delivered (located in folder #82)

Task Date Completed:

Received DOJ Approval?  Approval

Status Note:

2014 Q1 Update: Training Division tracked all required info in its current records management system while staff and TAC continue to explore new and better systems that may be implemented in the future for more efficiency and effectiveness.

2014 Q2 Update: Training Division tracked all required info in current system re: April 2014 ECIT training and the rest of the In-Service training sessions that ended in May.

2014 Q3 Update: Training Division continued to track required information while preparing the requirements to be included in the RFP for a new, more robust records management system. The development analyst completed the initial request for information and engaged with more than 15 vendors who provide that software and services. He is now working with the City's Procurement specialist to draft and publish the Request for Written Proposals. That should go out in October.

2014 Q4 Update: Training Division tracked its required information in its current system while awaiting action on its need for a more comprehensive records/learning management system. The RFP was completed and is ready for posting. However, now city officials must approve the plan for a new system rather than utilizing the city's current installation of SAP (City Learner).

2015 Q1 Update: In this quarter, the Training Division continued to await necessary City action to identify a Learning Management System (LMS) to replace our current system. In response to our draft Request for Proposal (RFP), the City's Bureau of Technology Services (BTS) conducted an assessment of existing systems within the City of Portland to determine if they could be configured to meet the unique needs of the Police Bureau. BTS has identified a system which it believes can be configured/customized to meet the needs of the Police Bureau. A technical demonstration of the system’s capabilities is scheduled for May 2015. In the interim, the Police Bureau’s RFP has been placed on hold until the technical demonstration has been completed.

2015 Q2 Update: The Training Division, in partnership with the Bureau of Technology Services, the Bureau of Human Resources, and Enterprise Business Solutions, is currently working through the City’s approval process to issue a Request for Proposal for the selection of a new Learning Management System (LMS). Our initial analysis of the current Learning Technologies within the City’s infrastructure has identified that the current in-house solutions are not able to meet the unique needs of the Police Bureau. We have finalized the Request for Proposal and are seeking final approval from the City’s Executive Steering Committee of our current LMS technologies to solicit an outside vendor through the procurement process.

2015 Q3 Update: To clarify any misunderstanding that DOJ or COCL's report may have created, the Training Division uses an on-premise software called Skills Manager to “electronically track, maintain, and report complete and accurate records of current curricula, lesson plans,
training delivered, attendance records, and other training materials.” This system has been in place since 2005 and operates as the “central, commonly-accessible, and organized file system.” The system stores all current data/records associated with sworn-member training.

However, PPB continues its efforts to select and implement a new Learning Management System that will allow the Police Bureau to add multiple levels of new and enhanced functionality to officer training, including the delivery of eLearning. In addition, it will provide significantly more robust reporting capabilities than what is currently available in Skills Manager. These new features and functionalities will allow the Training Division to operate with increased efficiencies in relation to the management of its data. To that end, in this quarter further discussions were had with the City regarding how best to achieve this goal. The City is still resistant to sending out a RFP and continues to look for solutions in-house.

With that said, however, the current systems in place meet, at a basic level, the requirements of this paragraph.

2015 Q4 Update: The Training Division continues the process of procuring a new Learning Management System. During the 4th Quarter, the City of Portland has focused on solidifying agreement on the Master Cloud General Terms & Conditions contract between SAP and the City. Since this Master Contract governs all cloud technology for the City of Portland and not just the Bureau of Police, the process is significantly longer. However, it is critical that time is taken to define agreeable terms for both the City and SAP as this contract will be in place long term and city-wide. Once this contract has been executed, the City can begin the procurement process for the SuccessFactors Learning Management System, which will begin in 2016.

2016 Q1 Update: The Training Division has selected a new Learning Management System (LMS) that meets 98% of their functional requirements. In February, the Training Division invited two vendors to technical interviews to demonstrate the functionality of their products and is now working with the Office of Management and Finance (OMF), Procurement Services to award the contract to the selected vendor. Funding for the new system has been approved by the Police Bureau and a contract should be executed before the end of the fiscal year (June 30th, 2016).

2016 Q2 Update: The Police Bureau has been actively working with the City of Portland’s Procurement Services Division to draft an executable contract to purchase Cornerstone OnDemand, a cloud-based Learning Management System. Procurement Services issued an Intent to Award on June 16, 2016 and the contract is now currently under attorney review. Once executed, the Police Bureau will begin the implementation of the new system.

2016 Q3 Update: The Cornerstone Learning Management System contract was signed on September 29, 2016 which has now allowed us to move forward with the plans for the design and implementation of the new learning management system.

Prior to the signing of the contract, the attorneys were still working on reviewing the contract and agreeing to terms that mainly revolved around deemed acceptance, effect of termination and data breach notification.

The Training Division underwent a few personnel changes which required a search for assistance in the development of the learning management system. Capt. Parman and Lt. Bell were transferred from the Training Division effective September 1, 2016. Also the non-sworn employee who had taken the lead on the implementation of the learning management system resigned effective August 31.

Thus, the Training Division contacted the IT department seeking assistance with the design of the system. An IS Analyst was assigned to assist with the project. Training's Admin Supervisor will also assume a role in the implementation process until the Learning Management Administrator position is filled. Those two individuals are scheduled for the Cornerstone “Boot Camp” in Santa Monica, CA Nov 6-10 and this will officially start the design and implementation of the system.

2016 Q4 Update: During the week of November 6-10, 2017, three PPB staff members traveled to the Cornerstone headquarters in Santa Monica, CA for the LMS “boot camp.” Prior to the trip to Santa Monica, Cornerstone emailed training modules so they could gain a basic understanding of the capacities of the system prior to their instruction.

During this training, staff were shown the LMS system modules, different programs they could utilize to meet the request of the DOJ document, converted data, created custom groups, processed work flow as it relates to the PPB Training Division and discussed implementation.

A staff member from Bureau of Technology Services (BTS) created extracts from SQL server to import all user information from the police system into the LMS and extracted our legacy data from skills manager and started looking at how to manipulate that
Creating and managing the LMS requires an on-going full time position. The Training Division submitted the paperwork for this new position to BHR and is hoping to have it posted and staffed soon. The needs of this position include: 1) the creation and maintenance of the system as well as training all user levels on how to use the system, 2) working with the curriculum development team to develop e-learning and attach lesson plans for the classes offered, 3) working with the administrative staff to ensure the correct titles, class credits, and reporting to DPSST is completed, and 4) interacting with the command staff to create the In-Service, New Hire and Advanced Academy learning modules within the system. This position requires a high level of customer service and will report directly to the Captain of the Training Division.

2017 Q1 Update: During this quarter, the Bureau of Human Resources Class Comp reviewed and classified the learning management system position within the Training Division as a Business Systems Analyst position. The position was posted as an internal recruitment within the City of Portland. The goal was to find internal candidates that would be able to fill the open position more quickly as they have already been backgrounded. PPB has three internal candidates who will be interviewed within the next few weeks. The Bureau expects to appoint one of the candidates to this position by the middle of May. The appointed candidate will interact with IT, Cornerstone representatives, admin staff, the Admin Supervisor and Lt McGlathy in configuring and developing the learning management system to provide a central, commonly-accessible and organized file system.

2017 Q2 Update: During this quarter, the Training Division hired Rachel Stansbury to be the Learning Management Administrator. Her first day was June 26, 2017. Rachel will be working with Lt. Kraig McGlathery to begin configuring Cornerstone to meet the needs of PPB and begin to implement the LMS to provide a central, commonly-accessible and organized file system.

2017 Q3 Update: Between July and September 2017, the Bureau began the implementation process of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward implementation and use during 2017 Q3:

- Lt. Kraig McGlathery, Dave Maller, and the newly hired LMS Administrator, Rachel Stansbury, met with the Seattle Police Department to review the department’s use of the LMS system and best practices.
- The Portland Police Bureau LMS team (McGlathery, Maller, and Stansbury) attended a two-day training provided by Cornerstone to learn how to integrate PPB’s needs with what the system is able to do.
- The LMS Administrator mapped out the fall In-Service process within Cornerstone and was able to produce rosters, confirm attendance, and generate the required information needed for DPSST reports.
- The historical data in the old database (Skills Manager) is currently being prepared for migration to the Cornerstone LMS.
- The LMS Administrator is working with the Cornerstone Implementation Team to determine the best process to track weapons qualifications in the LMS.

2017 Q4 Update: During the fourth quarter, the Portland Police Bureau continued the implementation process of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward implementation and use during 2017 Q4:

- The historical training data for all sworn and non-sworn personnel was uploaded into the Pilot site for the LMS to determine that all data has been migrated correctly. Once final testing is complete, this data will be uploaded to the Production site for the LMS and bureau members will have access to view their complete training records.
- Final preparations for the bureau-wide LMS launch were completed which will be launched in 2018Q1.

2018 Q1 Update: At the beginning of this quarter, a Bureau-wide launch of the LMS was successfully deployed. It has been utilized for the following tasks already:
- Sworn members were required to watch the various PPB Behavioral Health Unit’s (BHU) videos on the new Mental Health Template depending on rank and ECIT/CIT trained status. Notifications by email with follow-up reminders to members and then managers were sent by the system. Members had to provide their electronic signature acknowledging viewing the video(s).
- An Individual First Aid Kit (IFAK) refresher video was sent out to sworn personnel to go over what is contained in the IFAK. As with the MHT videos, email notifications and reminders were provided as well as electronic acknowledgment.
- Portland’s City Attorney’s Office provided legal updates for sworn personnel to review. The same notice and reminder system was used.

- Courses were entered into the LMS so that members could register themselves for training.

- The LMS was utilized during the entire 2018-1 Police Vehicle Operations In-Service which included daily rosters for lecture and skills portions as well as custom reports to report such training to DPSST.

- The LMS was configured by the administrator, in consultation with Cornerstone, to accommodate when members go on leave of service (LOS) to ensure that members are notified of what training they missed during their LOS that needs to be completed.

- Reports for the Rus were created so that administrative personnel may constantly track training records of that RU’s members.

2018 Q2 Update: Between April 1 and June 30, 2018, the Portland Police Bureau continued the process of implementing the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward that end as well as its use during 2018 Q2:

- Sworn members were sent a training that included a document to read, a video to watch, and a knowledge check to complete. This was the first time PPB used a knowledge check as part of the training curriculum in the LMS.
- The Advanced Academy rosters were added to the LMS via a curriculum and attendance for the first two Academies in 2018 were recorded electronically in the LMS.
- Trainings such as Legal Updates, Tips & Techniques, and videos continued to be sent out via the LMS to bureau members.
- A non-compliance report template for trainings assigned via the LMS was created and sent through channels to the Chief’s Office. This non-compliance report template will be sent for all trainings assigned in the LMS once they are 21 days past the training due date.

2018 Q3 Update: During this quarter, PPB continued to expand the capabilities of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward implementation and use during 2018 Q3:

- The first directive update was sent to members via the LMS. All sworn and non-sworn members were sent Directive 311.40, Personal Use of Social Media after it was approved by the Chief. Members were directed to read the directive and complete a knowledge check. After successfully completing the knowledge check, members provided their electronic acknowledgement. Additional directives were sent through the LMS in September 2018.
- The LMS Administrator created the means for supervisors to have the ability to view their direct reports transcripts in the LMS. Shift sergeants can view the transcripts and run transcript reports of officers in their shift.
- Lieutenants can view the transcripts and run transcript reports of sergeants and officers in their RU.
- Captains can view the transcripts and run transcript reports for lieutenants, sergeants, and officers in their RU.
- Commanders can view the transcripts and run transcript reports for any sworn member in their RU.
- Chief’s Office personnel can view transcripts and run transcript reports for any sworn member in the bureau.

A reference guide was created by the LMS Administrator so that sergeants, lieutenants, captains, commanders, assistant chiefs, and the deputy chief would be able to easily refer to instructions on how to review a member’s training record. His reference guide was added to the FAQ page in the LMS.

- The 2018-2 Range Qualifications were entered into the LMS and can be seen on member’s transcripts.

- The 2018-1 and 2018-2 Advanced Academy rosters were converted from the LMS into reports that could be sent to DPSST for official record keeping purposes.

- The 2018-2 In-Service All Sworn Members and 2018-2 Supervisor In-Service attendance was recorded in the LMS.

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• Sworn members were sent an additional Tips & Techniques to read and electronically acknowledge in the LMS.

• Sworn members were sent videos to watch for the upcoming MDC console replacement.

• A link to the LMS was added to the MDCs so that sworn personnel will be able to access LMS trainings while outside of the precincts.

• Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

• Instructor led trainings and discipline specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.

2018 Q4 Update: Between October and December 2018, the Portland Police Bureau continued the implementation process of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward implementation and use during 2018 Q4:

• The LMS Administrator created a way for supervisors to run a report on their direct reports showing trainings that are coming due. If a direct report has not completed the training, their name will remain on the report until it has been completed. This was tested with a sergeant and will be deployed to all supervisors in 2019 Q1.

• The LMS Administrator created an LMS onboarding process for new employees (both sworn and non-sworn). New members will receive a handout or email describing how to log into the LMS for the first time.

• The 2018-3 Range Qualifications were entered into the LMS and can be seen on member’s transcript.

• The 2018-3 In-Service trainings were entered into the LMS and can be seen on member’s transcript.

• A video regarding fentanyl exposure was sent to all sworn members at the request of the Drugs & Vice Division.

• Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

• Instructor-led trainings and discipline-specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.

2019 Q1 Update: In the first quarter of 2019, the Portland Police Bureau continued the implementation process of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward use during 2019 Q1:

• In coordination with the PPB Video Production Unit and PPB CPR Instructors, the LMS Administrator uploaded the CPR/First Aid videos and associated knowledge checks so that sworn members will be able to complete their CPR/First Aid certification through the LMS. After watching the videos and passing the knowledge checks, members will need a CPR/First Aid Instructor to observe them doing chest compressions correctly on a CPR mannequin. Instructors will then complete an observation checklist in the LMS as the final approval for a member’s CPR/First Aid certification. This training has only been sent to the CPR/First Aid Instructors with a planned release date for all sworn members in Spring 2019.

• The 2019-1 Range Qualifications are continuing to be entered into the LMS and can be seen on member’s transcripts.

• Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

• Instructor-led trainings and discipline-specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.

• Legal Updates and Tips & Techniques continue to be uploaded and assigned via the LMS.

• The LMS Administrator attended a two-day training provided by the LMS vendor, Cornerstone OnDemand, to gain a better understanding of the software.

2019 Q2 Update: The following provides a brief summary of the use of LMS during 2019 Q2:

• In coordination with the PPB Video Production Unit and PPB CPR Instructors, the LMS Administrator uploaded the CPR/First Aid videos and associated knowledge checks so that sworn members can complete their CPR/First Aid certification through the LMS. After watching the videos and passing the knowledge checks, members will need a CPR/First Aid Instructor to observe them doing chest compressions correctly on a CPR mannequin. Instructors will then complete an observation checklist in the LMS as the
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The following provides a brief summary of the use of LMS during Quarter 3:

- The 2019 All Sworn Member In-Service started in the Fall and members were registered into sessions in the LMS.
- The 2019 Professional Staff In-Service started in August 2019 and members were able to register themselves into one of a number of offered sessions that worked for their schedule.
- The 2019-2 Range Qualifications concluded on September 7, 2019 and qualifications were entered into the LMS and can be seen on members' transcripts.
- Instructor-led trainings and discipline specific in-service were entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.
- Legal Updates, Force Inspector Updates, training videos, and Tips & Techniques were uploaded and assigned via the LMS.
- Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

2019 Q4 Update: Here is a brief summary of progress made toward implementation and use during 2019 Q4:

- The 2019 All Sworn Member In-Service concluded in December, 2019 and registration and attendance was entered into the LMS and can be seen on member’s transcripts.
- The 2019-3 Range Qualifications began on October 7, 2019 and concluded on January 4, 2020 and qualifications were entered into the LMS and can be seen on members' transcripts.
- Instructor-led trainings and discipline-specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.
- Legal Updates, training videos, and Tips & Techniques continue to be uploaded and assigned via the LMS.
- Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

2020 Q1 Update: The following is a brief summary of progress made toward implementation and use of LMS during 2020 Q1:

- The 2020 All Sworn Member In-Service started on January 20, 2020. Registration and attendance was entered into the LMS and can be seen on member’s transcripts. However In-Person In-Service was suspended due to the COVID-19 Pandemic. Videos of the classroom portion of the training have been uploaded to the LMS and members who were originally scheduled to attend in-person have until May to watch them via the LMS. Officers must still pass the knowledge check to demonstrate their understanding of the material. Delivery of the training on LMS is also being tracked and can be viewed in the member's transcript when complete. The Training Division is still working on a plan to deliver the skills portion of the 2020 In-service to the rest of the members within the confines of required social distancing.

- The 2020-1 Range Qualification was also suspended as a result. Those members who previously qualified have been entered into the LMS and can be seen on member’s transcripts. Thus it will be possible to determine which officers need to make up this session. It is uncertain if a make-up session will be held. This is dependent on the length of the pandemic. PPB requires more firearms certifications than state standards so PPB officers will maintain their compliance with state standards.

- Instructor-led trainings and discipline specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.
- Legal Updates, directives, training videos, and Tips & Techniques continue to be uploaded and assigned via the LMS.

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Non-compliance memos continue to be sent to the Chief's Office when deadlines for trainings have not been met.

Supervisors continue to access the LMS to assess the training records of officers under their command.

2020 Q2 Update: Between April and June 2020, the Portland Police Bureau continued the utilization of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward implementation and use during this quarter:

- Due to the COVID-19 pandemic, in early March the 202 In-Service was restructured from in-person presentation to an online format. All members who had not yet attended the in-person sessions were required to watch the videos of the classroom courses through the LMS by May 28, 2020.
- An update of completion rates was sent to the COCL after the due date had passed.
- Instructor-led trainings and discipline-specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.
- Legal Updates, directives, training videos, and Tips & Techniques continue to be uploaded and assigned via the LMS.
- Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

2020 Q3 Update: During the third quarter of 2020, the Cornerstone Learning Management System (LMS) served as an even more critical tool for PPB. As a result of the COVID epidemic, the Division began to look more intensely and sooner than anticipated at how LMS could be utilized to provide the needed PPB trainings. This is part due to the limitations imposed by restricting the numbers who could gather and social distancing required but was always a long-term goal.

In addition, the following usual activities with LMS occurred during this time period:
- The 2020-2 Range Qualification period started and members' records are being updated with qualification information when they complete their qualification.
- Legal Updates, directives, training videos, and Tips & Techniques continue to be uploaded and assigned via the LMS.
- Instructor-led trainings and discipline-specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.
- Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

2020 Q4 Update: Between October 2020 and December 2020, the Portland Police Bureau continued its use of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made during Q4:

- The 2020 BHU Roles and Responsibilities of All Sworn PPB Members on Mental Health Related Calls training was created by BHU, the PPB Video Production Specialist, and the PPB LMS Administrator. The training consisted of four interactive segments that required members to click through each slide. This training was due for the majority of members on 12/11/2020.
- The 2020 CHO Stops App Update training was created by the CHO, SSD, the PPB Video Production Specialist, and the PPB LMS Administrator. The training consisted of a video and interaction to complete the training. This training was due for the majority of members on 12/19/2020.
- In conjunction with the PPB Video Production Unit, the January 2021 Online In-Service trainings were built and finalized. The January 2021 Online In-Service trainings consist of the following:
  o 2021 Online In-Service Training TECC Refresher
  o 2021 Online In-Service Training Box In Refresher
  o 2021 Online In-Service Training Equity Training Series Introduction
  o 2021 Online In-Service Training Axon Annual CEW Update
- 2020 Supervisor In-Service videos were uploaded to the PPB LMS for all professional staff and sworn supervisors to complete. These trainings were due for the majority of supervisors on 12/11/2020.
- The PPB LMS Administrator contributed to the administrative logistics of the City Attorney’s Office hosting the 11 sessions of the HR 2.02 for Managers/Supervisors via Zoom.
- The PPB LMS Administrator and the PPB Video Production Specialist attended the three-day Adobe Max Virtual Conference to learn new and innovative ways to engage learners while we move to more online training.
- PPB EAP requested a PowerPoint training they created be converted into an online training where members would need to click
through each slide. The PPB LMS Administrator converted this training and it was assigned to EAP members.

- The 2020-2 Range Qualification period ended and data was pulled to report to DPSST.
- The 2021 Annual Sworn Member In-Service (in person) was set up in the PPB LMS.
- The 2021-1 Range Qualification was set up in the PPB LMS. Range Qualifications for this period start on January 11, 2021.
- Legal Updates, directives, training videos, and Tips & Techniques continue to be uploaded and assigned via the LMS.
- Instructor led trainings and discipline specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.
- Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

**2021 Q1 Update:**
Between January 2021 and March 2021, the Portland Police Bureau continued the implementation process of the Cornerstone Learning Management System (LMS). The following provides a brief summary of progress made toward implementation and use during 2021 Q1:

- Online In-Service training was created, uploaded, and assigned to bureau members for January, February, and March 2021 trainings. These trainings include:
  - 2021 Online In-Service Training PVO: Box In Refresher
  - 2021 Online In-Service Training Annual Axon CEW Update
  - 2021 Online In-Service Training TECC Refresher
  - 2021 Online In-Service Training Equity Training Series – Introduction
  - 2021 Online In-Service Training Wellness: Officer Wellness and Resilience (2021)
  - 2021 Online In-Service Training Annual Nuclear Reactor Response Video
  - 2021 Online In-Service Training Wellness: Interoception and Mindful Movement
  - 2021 Online In-Service Training Equity Training Series – Preparation
  - 2021 Online In-Service Training Chicago Case Study

- Online In-Service training was created for following months of training.
- The PPB LMS Administrator attended advanced Adobe Captivate trainings to further learn how to create engaging and effective interactive trainings.
- The 2021 Annual Sworn Member In-Service (in-person) began in January 2021 and members’ attendance has been recorded in the PPB LMS.
- The 2021-1 Range Qualification period ended and data was pulled to report to DPSST.
- Legal Updates, directives, training videos, and Tips & Techniques continue to be uploaded and assigned via the LMS, as requested.
- Instructor led trainings and discipline specific in-services continue to be entered into the LMS and members either register themselves or are registered by Training Division personnel depending on the type of training.
- Non-compliance memos continue to be sent to the Chief’s Office when deadlines for trainings have not been met.

**2021 Q2 Update:**

**2021 Q3 Update:**

**2021 Q4 Update:**

**2022 Q1 Update:**

**2022 Q2 Update:**

**2022 Q3 Update:**

**2022 Q4 Update:**

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Task Description
Semi-annual reporting of training to AC and DOJ

Task Requirements: PPB shall report training delivered and received semi-annually to the Assistant Chief of Operations and, during the pendency of the Agreement, to DOJ.

Status Complete - review ongoing

Action Steps:
1. Training will gather appropriate data on course attendance, training provided, and other relevant information
2. Training will provide such data in a report to CHO and DOJ semi annually
3. Training will establish SOP to ensure ongoing reporting is an established protocol for the Division

Task Date Completed: 10/18/2013

Evidence of Completion:
1. Demonstration of Skills Manager as point of access for training records for all employees (upon request)
2. First semi annual report to CHO and DOJ on training delivered and received, demonstrated through Course Attendance Reports.
3. Draft new Training SOP 1-20 Semi-Annual Reporting of Training Given and Received

Status Note:

2014 Q1 Update: Training Division submitted required semi-annual report to the Assistant Chief and Compliance team forwarded it to DOJ.

2014 Q2 Update: This report was not due this quarter.

2014 Q3 Update: Training Division submitted required semi-annual report to the Assistant Chief which will be forwarded to DOJ with this report.

2015 Q1 Update: This report was not due this quarter.

2015 Q2 Update: The Training Division provided the required semi-annual report to the Assistant Chief. It will be forwarded to DOJ with this report.

2015 Q3 Update: This report was not due this quarter.

2015 Q4 Update: The Training Division provided the required semi-annual report to the Assistant Chief. It will be forwarded to DOJ with this report.

2016 Q1 Update: This report was not due this quarter.

2016 Q2 Update: A report for the all training delivered to PPB members during both Q1 and Q2 was created and forwarded the Assistant Chief of Operations.

2016 Q3 Update: This report was not due this quarter.

2016 Q4 Update: A report for all training delivered to PPB members during both Q3 and Q4 was created and forwarded the Assistant Chief of Operations.

2017 Q1 Update: The Semi-Annual Training Report was not due this quarter.

2017 Q2 Update: A report for all training delivered to PPB members during both 2017 Q1 and Q2 was created and forwarded to the Assistant Chief of Operations.

2017 Q3 Update: The Semi-Annual Training Report was not due this quarter.

2017 Q4 Update: A report for all training delivered to PPB members during both 2017 Q3 and Q4 was created and forwarded to the Assistant Chief of Operations.

The Internal Courses list was generated using Skills Manager. The External Courses list was generated using the LMS.

2018 Q1 Update: The Semi-Annual Training report was not due during this reporting period.

2018 Q2 Update: the Semi-Annual training report on all training delivered and received by PPBs members between January 1, 2018 and June 30, 2018 was forwarded to the Assistant Chief of Operations, Ryan Lee.
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2018 Q3 Update: The Semi-Annual Training report was not due during this reporting period.
2018 Q4 Update: The Semi-Annual training reports were sent to Deputy Chief Day and Assistant Chief Lee on January 17, 2019.
2019 Q1 Update: The Semi-Annual training report was not due this quarter.
2019 Q2 Update: The Semi-Annual training report was sent to Deputy Chief Jami Resch and Assistant Chief Christopher Davis on July 17, 2019.
2019 Q3 Update: The Semi-Annual training report was not due this quarter.
2019 Q4 Update: The Semi-Annual Training Report was sent to Chief’s Office for Deputy Chief C. Davis and Assistant Chief M. Frome on January 18, 2020. It contained all training delivered and received by PPB member between July 1, 2019 and December 31, 2019.
2020 Q1 Update: The Semi-Annual Training Report was not due this quarter. The next report will be delivered in July and contain training delivered and received from January 1, 2020 to June 30, 2020.
2020 Q2 Update: The Semi-Annual Training Report for 2020 Q1 & Q2 (January 1 through June 30) was delivered to Deputy Chief Davis and Assistant Chief of Operations Frome on July 9th, 2020.
2020 Q3 Update: The Semi-Annual Training Report was not due this quarter.
2020 Q4 Update: The reports were delivered to Deputy Chief Davis and Assistant Chief Frome on January 11, 2021. They contain the Semi-Annual Training Report for Q3 and Q4 of 2020 (July 1 to December 31, 2021).
2021 Q1 Update: The Semi-Annual Training Report was not due this quarter.
2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

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Task Description
Training officer selection and requirements

Task Requirements: PPB shall institute guidelines to govern its selection of officers that serve as trainers and shall ensure that those officers do not have a history of using excessive force. The trainer selection guidelines shall prohibit the selection of officers who have been subject to disciplinary action based upon the use of force or mistreatment of people with mental illness within the three (3) preceding years, or twice in the preceding five (5) years, and will take into account if a civil judgment has been rendered against the City in the last five (5) years based on the officer's use of force.

Status Complete - pending external review

Action Steps: 1. Training will revise SOP concerning Trainer Selection to include stipulations in this provision of the agreement.

Task Date Completed: 6/12/2013

Evidence of Completion: 1. Training Division SOP 1-19

Status Note:
2014 Q1 Update: SOP 1-19 effective January 1, 2014 includes the prohibitions outlined in the Agreement.

2014 Q2 Update: Relevant SOP still in effect and being adhered to when selecting trainers.

2014 Q3 Update: SOP 1-19 still in effect and is adhered to when selecting trainers.

2015 Q1 Update: SOP 1-19 remains in effect and is followed when selecting trainers.

2015 Q2 Update: SOP 1-19 is still in effect and is adhered to when selecting new trainers.

2015 Q3 Update: SOP 1-19 remains in effect but no new trainers were selected this quarter so it was not implicated.

2015 Q4 Update: SOP 1-19 was reviewed and revised and became effective January 1, 2016. No new trainers were selected this quarter.

2016 Q1 Update: During this quarter, the Training Division filled a position for the Armory. The job announcement was posted on October 9, 2016 and closed on October 23, 2016. A total of seven members applied for the position. One person withdrew prior to the interview and the Training Division interviewed the six remaining candidates. The Training Lieutenant reviewed all of the interviewees' Internal Affairs Histories and checked with the City Attorney’s Office and found none of them had any incidents which would disqualify them under paragraph 83 of the DOJ agreement. The Training Division Work History Review Sheet is included in the supporting documents folder. The same format that was used for selecting ECIT officers was utilized in this process.

The Training Division selected Officer Kelly Vanblokland and notified him on February 8, 2016 that he had been selected. At the time of his selection, Officer Vanblokland was assigned the Training Division as a Lead Firearms Instructor. Officer Vanblokland transitioned into the Armory Position during the week of February 15th.

2016 Q2 Update: The relevant SOP remains in effect but there were no new employees added to the Training Division during this quarter.

2016 Q3 Update: An officer was transferred to FTEP on July 28, 2016. The Training Lieutenant followed the selection standards outlined in SOP 1-19, which include the requirements in Paragraph #83 in selecting this officer.

2016 Q4 Update: During this quarter, the Training Division posted and selected 12 members to attend a Patrol Tactics Satellite Instructor School. These positions are detached from the Training Division, but they are used to assist the Lead Instructors during Inservice and Advanced Academy.

The position announcement was posted on October 12, 2016 and closed on October 28, 2016. Thirty-five members applied for the positions. One selected member could not attend, and another member was selected to attend in his absence.

The Training Lieutenant reviewed all of the interviewees' Internal Affairs Histories and checked with the City Attorney’s Office and
found none of them had any incidents which would disqualify them under paragraph 83 of the DOJ agreement. The Training Division Work History Review Sheet is included in the supporting documents folder.

2017 Q1 Update: During the first quarter, the Training Division held a Satellite Instructor School for Taser Instructors. The Training Division followed SOP 1-19 for screening the instructors.

An Officer was permanently assigned to the Training Division on March 23, 2017 to serve as the Advanced Academy Coordinator. This Officer previously had been temporarily assigned to the Training Division while on a light duty contract since January 31, 2017. Staff followed SOP 1-19 criteria for his appointment to the Advanced Academy Coordinator position.

On January 27, 2017 another Officer was temporarily assigned to the Training Division as a Defensive Tactics instructor for Inservice while the regular instructor was on FMLA. This temporary Officer had completed the Patrol Tactics Instructor School in 2016 Q4 so his screening pursuant to SOP 1-19 was done at that time and remained in effect.

Officer Todd Engstrom #29982 was permanently assigned to the Training Division on March 23, 2017 to serve as the Advanced Academy Coordinator. Officer Engstrom had been temporarily assigned to the Training Division while he was on a light duty contract since January 31, 2017. While Officer Engstrom was at the Training Division we followed SOP 1-19 criteria for appointment to the Advanced Academy Coordinator position.

Officer Ryan Albertson #42625 was temporarily assigned to the Training Division on January 27, 2017, to instruct Defensive Tactics during In-service while Officer Derrick Foxworth was on FMLA leave. Officer Albertson recently completed the Patrol Tactics Instructor School and his SOP 1-19 was completed during 2016 Q4.

2017 Q2 Update: Pursuant to SOP 1-19 the Training Division selected Jennifer Williamson to fill the vacant officer position in FTEP.

Officers Flippo, Manus and Wiley were assigned to the Training Division on a temporary basis until December 31, 2017 to assist with Inservice and the Advanced Academy.

2017 Q3 Update: During the third quarter, the Training Division held a Field Training Officer (FTO) School. The Training Division followed SOP 1-19 for screening the FTO applicants.

2017 Q4 Update: The Training Division did not add any additional instructors during 2017Q4

2018 Q1 Update: The Training Division did not add any additional instructors during this quarter.

2018 Q2 Update: The Training Division only held one school during this quarter in which members were selected as AR-15 operators. The Training Division reviewed each applicant's work history including items outlined in SOP 1-19.

One officer had to withdrawal from the class due to illness. All others successfully completed the course.

2018 Q3 Update: During the third quarter, the Training Division conducted the 2018-1 Patrol Tactics (Patrol Procedures) Satellite Instructor School. All who attended met the guidelines.

The Training Division added the following staff during 2018Q3. All of them were checked per SOP 1-19 and met the qualifications. All of the members were serving as satellite instructors for the Training Division at the time of their transfer:

Officer Randy Haukins as a Lead PVO Instructor on July 26, 2018.
Officer Tim Ferguson as a Defensive Tactics Instructor TDY for 2018-3 Inservice on September 3, 2018.
Officer Josh Ladd as a Firearms Instructor TDY for 2018-3 Inservice on September 6, 2018.
Officer John Romero as the Lead Procedural Justice Instructor on September 6, 2018.
Officer Charles Ashiem as a Patrol Procedures Instructor TDY for 2018-3 Inservice on September 18, 2018.

2018 Q4 Update: During this quarter, the Training Division conducted two AR15 schools. Please see the Special Order for the 2018-2 and 2018-3 New AR15 Operator Training and the work history sheet.

The Training Division also conducted the 2018 -2 FTO Instructor School from November 5 through 7, 2019. Please see the
The Training Division added the following staff during 2018Q4. All of them were checked per SOP 1-19 and met the qualifications. Officers Clark and Cox were current satellite instructors for the Training Division at the time of their transfer. Officer Bruner-Dehnert is currently certified as a ECIT officer: Officer Bradley Clark as a Lead Control Tactics Instructor on October 4, 2018. Officer Amy Bruner-Dehnert as the Lead Leadership Instructor on November 1, 2018. Officer Brandon Cox as the Lead AR15/40mm Instructor on December 13, 2018.

**2019 Q1 Update:** During 2019 Q1 the Training Division conducted three 40mm Less Lethal Basic Operator classes. All of the members were reviewed per SOP 1-19. Please see the attached work history review, position announcement and special order.

The Training Division filled one full time sworn position for the Wellness Officer. Officer Leo Harris was selected. He has been a full time sworn trainer for the Patrol Procedures program for several years, so a work history review was not required to be completed.

**2019 Q2 Update:** During the second quarter, the Training Division conducted an AR-15 Instructor School. All the prospective trainers were reviewed per SOP 1-19 (please see attached work history review and position announcement) prior to being selected for the school.

The Training Division filled one full-time sworn position for the Patrol Procedures program(see attached position announcement). Ofc. Dominic Lovato was selected for this position. Per SOP 1-19, Lt. J. Clark performed the work history review prior to selecting Ofc. Lovato for the position.

**2019 Q3 Update:** The Training Division temporarily filled one full-time sworn position for Patrol Procedures in this quarter. Ofc. Roger Walsh was selected for this position as part of a process which began in Q2. However, he is returning to Central and thus the position is once again vacant. Per SOP 19-1 a work history review was performed prior to his selection.

**2019 Q4 Update:** Officer Tim Ferguson was added to the Training Division during the fourth quarter as a Lead Control Tactics Instructor. He was part of a selection process that began in a prior quarter and was already a certified control tactics trainer. His work history was updated per SOP 19-1 prior to his selection.

There were no other trainers selected this quarter. However, the processes for Field Training Officer and 40mm Less-Lethal Instructor selections were initiated. The results of the selection processes will be reported in next quarter's update.

**2020 Q1 Update:** Officer Neil Parker and Rob Bender were added to the Training Division during 2020Q1 as Patrol Procedures and PVO instructors. Their work history was reviewed per SOP 19-1 prior to his selection (see attachment 2020 Trainer Work History Review Sheet Parker_Bender Q1).

A group of officers were selected as Field Training Officers (FTOs). Their work history was reviewed per SOP 19-1 prior to their selection.

A group of officers were selected for 40mm Less Lethal Training. Their work history was reviewed per SOP 19-1 prior to their selection. Note: this list only contains individuals who were selected for and passed the training.

No other trainers were selected this quarter.

**2020 Q2 Update:** No trainers were added to the Training Division this quarter. Additionally, there were no new classes to certify Field Training Officers or 40mm Less Lethal, AR, Satellite instructors.

**2020 Q3 Update:** No trainers were selected this quarter.

**2020 Q4 Update:** Officer Rehanna Kerridge was added to the Training Division during 2021 Q4 as a full-time trainer for the ABLE (ACTIVE...
2021 Q1 Update: Officer Dan Nipper was added to the training Division in 2020 Q1 as a Firearms Instructor. His work history was reviewed per SOP 1-19 prior to selection (see supporting documents). A training selection process for the Armorer position began this quarter but was not completed until the second quarter. The results of this process, including supporting documents related to SOP 1-19 Training Division Instructor Selection Standards, will be provided in the Q2 report.
OFFICER IN-SERVICE TRAINING ON DOJ AGREEMENT

**Task Description:**
Officer In-Service Training on DOJ Agreement

**Task Requirements:**
All training that PPB provides shall conform to PPB's current policies at the time of training. PPB shall train all officers on the Agreement's requirements during the next in-service training scheduled.

See specific requirements for officer training outlined in the Agreement, #84.

**Status:**
Complete - review ongoing

**Action Steps:**
1. Training will incorporate the provisions of the Agreement into its 2013 In Service training.
2. Training will incorporate Agreement provisions and resulting policies or protocols into its annual needs assessment analysis, which informs future trainings.

**Evidence of Completion:**
1. 2013 In Service Lesson Plans and in-service overview

**Task Date Completed:**
2/22/2013

**Received DOJ Approval?**
Approval

**Evidence of Completion:**
1. 2013 In Service Lesson Plans and in-service overview

**Status Note:**

**2014 Q1 Update:**
Start of 2014 In-Service training conformed to current PPB policies at the time and included more scenario-based training re: persons with mental illness, discussion re: de-escalation techniques and problem-solving skills.

**2014 Q2 Update:**
Training Division completed the 2014 In-Service for all PPB in May which conformed to current PPB policies and included more scenario-based training re: persons with mental illness, discussion re: de-escalation techniques and problem-solving skills.

**2014 Q3 Update:**
No In-Service or DOJ related training conducted this quarter.

**2014 Q4 Update:**
No In-Service training provided this quarter. However, EIS training was conducted for all supervisors throughout the month of November. The day-long session also included updated training on the revised Directive 940 and Performance Evaluations, all of which are DOJ-related.

**2015 Q1 Update:**
For all intents and purposes, no In-Service training conducted this quarter as the 2015 session began on March 30 and will continue through the next quarter.

**2015 Q2 Update:**
The first half of the 2015 In-service training took place from March 30 through May 21. It included a DOJ update session.

**2015 Q3 Update:**
The 2015 In-Service training recommenced on August 31 after a break to allow police coverage for all the activities that occur during the summer in Portland. It will continue through mid December. It continues to include a DOJ update session.

**2015 Q4 Update:**
The 2016 In-Service training continued throughout this quarter until its completion on December 10th. A DOJ update was included.

**2016 Q1 Update:**
There was no In-Service training conducted this quarter.

**2016 Q2 Update:**
There was no in-service training during this quarter. The Advanced Academy had an hour long class on April 11th with Captain Marshman. The topic was the DOJ settlement agreement.

**2016 Q3 Update:**
PPB's 2016 In-Service commenced in September and will continue until mid-November. It covered the following DOJ-related topics:

- Tactical Emergency Casualty Care
- 850.20, the Mental Health mask and the upcoming opening of the Unity Center
- 1051.00 and transition to X2 Taser
- Crisis Intervention refresher scenario11

**2016 Q4 Update:**
PPB's 2016 In-Service concluded in November. It covered the following DOJ-related topics:

- Tactical Emergency Casualty Care
- 850.20, the Mental Health mask and the upcoming opening of the Unity Center
- 1051.00 and transition to X2 Taser
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Crisis Intervention refresher scenario

2017 Q1 Update: The 2017 In-Service began on March 2 and will until continue through next quarter. It consists of 20 hours of instruction delivered over a 2-day period and includes the crisis intervention refresher class "The Scaled Crisis Response Model".

2017 Q2 Update: The first half of 2017 In-Service concluded on June 27. Again it was comprised of 20 hours of instruction over 2 days. Instruction included the DOJ-related classes of the Scaled Crisis Response Model; Disengagement with a Plan; and the annual CEW recertification.

2017 Q3 Update: The Training Division started delivering the second half of 2017 Inservice on September 7, 2017. It will run through mid-December. The Training Plan included sessions on the new use of force policy 1010.00 and the Crowd Control policy, both of which are DOJ-related.


2018 Q1 Update: The Bureau's 2018 Spring In-service and Supervisors' training commenced this quarter and will continue until early August. It included sessions on Implicit Bias; Decision Making model; After Action reports; and the new Accountability directives.

2018 Q2 Update: The Training Division completed 2018-2 In-service on August 3, 2018. All of the lesson plans have been provided to the DOJ/COCL in prior reports. The only lesson plan which was changed was the Implicit Bias Class (see page 46 for removal of video) and this lesson plan is included in supporting documents.

Supervisor’s Inservice concluded on July 18, 2018 and all of the lesson plans have previously been provided to the DOJ/COCL in prior reports.

The 2018-3 Inservice started on September 7, 2018 and will continue into mid-December. The lesson plans were reviewed and approved by DOJ and COCL in advance.

2018 Q4 Update: The Training Division completed 2018-3 In-service on December 20, 2018. All of the lesson plans were reviewed and approved by DOJ and COCL.

2019 Q1 Update: During this quarter, the Training Division conducted Supervisor In-service for all sworn supervisors. Supervisors In-service was held from February 12, 2019 through April 13, 2019. It included a class on Procedural Justice and Legitimacy as well as Leadership.

2019 Q2 Update: The Training Division completed Supervisor In-service for all sworn supervisors on April 13, 2019. This In-service began last quarter and all relevant materials were provided in the 2109Q1 report.

2019 Q3 Update: In September, the Training Division began In-service for all sworn members. It will conclude in December. Lesson plans were reviewed by the COCL and DOJ prior to the commencement of this training.

During In-service, in consultation with DOJ, changes were made to the Control Tactics lesson plan to address concerns highlighted by the DOJ. A copy of the new lesson plan was provided by the Training Division.

2019 Q4 Update: The 2019 In-service training concluded in Q4. Lesson plans and other materials for this training, which began in Q3, were already provided to the DOJ and COCL.

2020 Q1 Update: The 2020 In-service began on January 20, 2020. It was partially delivered at the Training Division but was suspended in March due to the COVID pandemic. The classroom portions of the training had been videotaped so were transitioned to the LMS. PPB sworn personnel have until May to complete the LMS version of this training. Officers must still pass the knowledge check to demonstrate their understanding of the material. The Training Division is still determining the best method for delivering the skills portion of this In-service given the Governor's current directive re: social distancing.

Prior to In-service commencing lesson plans and other relevant class materials were provided to the DOJ and COCL.

2020 Q2 Update: As reported last quarter, the 2020-1 Inservice was suspended in March due to the COVID 19 Pandemic. The classroom portions of
the training were converted to an online format and delivered via the LMS. The materials delivered both in the classroom and online included knowledge checks to ensure all officers were adequately trained.

The Training Division has not yet determined how it will deliver the remaining skills portions of this year’s training. The Division will continue to monitor the situation to ensure that adequate training is delivered in a safe and efficient manner, consistent with the Governor’s directives vis-à-vis social distancing and the appropriate use of personal protective equipment.

2020 Q3 Update: The Training Division delivered and completed its first New Sergeants Academies during this quarter. Prior to this training, all new sergeants attended the Metro Sergeants Academy. The Metro Academy is a regional academy jointly delivered by agencies in the Portland Metropolitan area. However, like the PPB’s 2020 Annual Inservice, because of the COVID-19 Pandemic, the Metro Sergeants Academy was delayed until sometime in 2021. The Bureau did not want to wait that long as it had just promoted close to two dozen officers.

Lesson plans for PPB New Sergeants Academy were reviewed by the DOJ and COCL. A representative of the COCL attended selected portions of the training to observe.

The training meets state requirements for sergeant training and covers a wide-variety of topics. Particular emphasis was placed on 315.30 Satisfactory Performance as it places new emphasis on the Sergeants to retain their supervisory perspective at critical incidents.

2020 Q4 Update: The Training Division delivered its second New Sergeants Academy during this quarter. Prior to this training, all new sergeants attended the Metro Sergeants Academy. The Metro Academy is a regional academy jointly delivered by agencies in the Portland Metropolitan area. However, like the PPB’s 2020 Annual Inservice, because of the COVID-19 Pandemic, the Metro Sergeants Academy was delayed until sometime in 2021. The Bureau did not want to wait that long as it had just promoted close to two dozen officers to sergeant. Lesson plans for PPB New Sergeants Academy were reviewed by the DOJ and COCL.

The training meets state requirements for sergeant training and covers a wide-variety of topics. Particular emphasis was placed on 315.30 Satisfactory Performance as it places new emphasis on the Sergeants to retain their supervisory perspective at critical incidents.

The Training Division completed preparations for its 2021 In-service, scheduled to begin January 11, 2021. Lesson plans for the In-service were made available to the DOJ and COCL.

2021 Q1 Update: The Training Division began its 2021 In-service on January 11, 2021. This 20 hours of In-service consists of materials from the 2020 In-service that a majority of the members did not receive last year due to the suspension of in-person In-service because of COVID. It is being conducted to ensure all PPB sworn officers have comparable training. Lesson plans were reviewed and approved by DOJ and COCL.

The Training Division also began its inaugural Online In-service for the other half. This training consists of videos, interactive online trainings and other documents delivered via the PPB’s Learning Management System (LMS). Members receive these trainings monthly. This program continues to evolve over time as the Training Division develops its capabilities in this area.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

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Supervisors' Training

**Task Requirements:** With respect to supervisors, provide additional training on how to:

1. Conduct use of force investigations . . .;
2. Evaluate officer performance as part of PPB's annual performance evaluation system; and,
3. Foster positive career development and impose appropriate disciplinary sanctions and non-disciplinary corrective action.

**Action Steps:**
1. Develop protocols and policies related to supervisory responsibilities identified in action item
2. Develop supervisor In Service training material to teach new responsibilities to supervisors
3. Schedule and deliver supervisor In Service training
4. Incorporate materials from supervisory In Service training into sergeants academy training

**Evidence of Completion:**
1. Directive 1010.00 - Use of Force (located in folder #66-67)
2. Supervisor Investigation Checklist (located in folder #72)

**Status Note:**

2014 Q1 Update: Supervisors' January 2014 In-Service curriculum included training on force investigations and reports and the discipline guide.

2014 Q2 Update: Inspector and EIS Lieutenant initiated work on a training lesson plan related to 940s and use of EIS for all supervisors to be conducted throughout the month of November. Executive Officer for Services branch will train on the new annual performance evaluation system as part of that same training program.

2014 Q3 Update: Almost all supervisors received the updated training on 940s, use of the EIS system and the new annual performance evaluation system in sessions scheduled through the month of November. A make-up session for those few who could not attend in November is scheduled for February 16, 2015.

2014 Q4 Update: The make-up session for the November trainings on EIS, 940s and the performance evaluation system did take place on February 16, 2015.

2015 Q1 Update: There was no solely "Supervisor" training held this quarter but In-Service was conducted throughout this time period which all sworn members are required to attend.

2015 Q2 Update: There was no exclusive "Supervisor" training held this quarter. However, 2015 In-Service started up again at the very end of August, which all sworn members are required to attend.

2015 Q3 Update: There was no exclusive "Supervisor" training this quarter. However, Sergeants (as well as patrol officers) attended refresher RegJIN training to address issues that have arisen since "go-live" and to prepare for the implementation of the Mental Health mask for most call types. Also, 2015 In-Service continued through this quarter and ended in December.

2016 Q1 Update: There was no exclusive "Supervisor" training this quarter.

2016 Q2 Update: There was no exclusive "Supervisor" training this quarter. The next session is scheduled as part of 2016 In-Service beginning in September.

2016 Q3 Update: The 2016 In-service training that commenced in early September did include a day of Supervisor's training that focused on Tasers, 2.02 Refresher, Reasonable Suspicion Training, After Actions, AR-15 and Tactical Emergency Casualty Care.

2016 Q4 Update: The 2016 In-service training that commenced in early September and concluded in November did include a day of Supervisor's training that focused on Tasers, 2.02 Refresher, Reasonable Suspicion Training, After Actions, AR-15 and Tactical Emergency Casualty Care.

Friday, May 7, 2021
2017 Q1 Update: The 2017 In-Service began on March 2 and will until continue through next quarter. It consists of 20 hours of instruction delivered over a 2-day period and includes Supervisor's training on the Employee Information System (EIS).

2017 Q2 Update: In-Service continued until June 27, 2017 which included the Supervisor's training on the Employee Information System (EIS).

2017 Q3 Update: The Bureau intended to offer Supervisor's Training as part of the Spring In-service but that plan was revised due to other demands on the Training Division for a second day of classroom and scenario training. It will now be held during Spring 2018 In-service.

2017 Q4 Update: There was no exclusive “Supervisor” training this quarter. The next session is scheduled as part of 2018 Spring In-Service beginning in April.

2018 Q1 Update: There was no exclusive “Supervisor” training this quarter. The next session is scheduled as part of 2018 Spring In-Service beginning in mid-May.

2018 Q2 Update: The Training Division conducted Supervisors' training this quarter which included:
   - After Actions / Use of Force Reporting and Critical Decision Making for Supervisors
   - 1010.10 Deadly Force and In-Custody Death Reporting and Investigation Procedures
   - Performance evaluation and After Actions as it relates to corrective action
   - EIS
   - Pursuit Management
   - Directive 330 series: Investigations / accountability
   - Audit Tool for the Mental Health Template
   - Case Management

2018 Q3 Update: Supervisor's Inservice concluded on July 18, 2018 and all of the lesson plans have previously been provided to the DOJ and COCL.

2018 Q4 Update: There was no exclusive “Supervisor” training this quarter.

2019 Q1 Update: During this quarter, the Training Division conducted Supervisor In-service for all sworn supervisors. Supervisors In-service was held from February 12, 2019 through April 13, 2019. All of the lesson plans and class materials were previously provided to the DOJ and COCL.

2019 Q2 Update: Supervisors' Training concluded early in this quarter.

2019 Q3 Update: There was no general Supervisor In-service this quarter. However, newly promoted PPB Lieutenants received external training coordinated by the City of Portland’s Office of Equity and Human Rights and the PPB’s Equity and Inclusion Office. The one-day training, “Leading with a Racial Equity Lens for Structural Transformation” was offered for two sessions September 26 and 27, 2019.

2019 Q4 Update: There was no general Supervisor In-service this quarter. However, the 2019 In-service did have a week dedicated to Command members. This training mirrored that provided to other sworn members but emphasis was placed on policy and tactical considerations from a command perspective.

2020 Q1 Update: There was no general Supervisor In-service this quarter.

2020 Q2 Update: The only scheduled supervisor training for this quarter was the 2020-1 New Sergeant’s Academy. Due the demands on the members created by the civil unrest in the city, the first session of this training was cancelled. Those class attendees were rescheduled to one of the two remaining sessions (one in July and the other in September 2020).

The COCL and DOJ reviewed lesson plans and the Training Division is in the process of incorporating their recommendations.

2020 Q3 Update: As noted in 84a, the Training Division delivered its New Sergeants Academy during the third quarter. Additional supervisory/command training and training development included the following topics:
   - Command (lieutenants and above) received 8 hours of fiscal training on issues such as contract risk, city agreements and other related topics. These trainings are scheduled to occur during 2020 Q3 and Q4
   - The Training Division worked with the Inclusion and Equity Office to plan an “Equity Lens Training” for all command personnel. This 4-hour class focuses on the use of the City’s Equity Lens and how to incorporate the checklist into daily operations. The...
training will be delivered in 2020 Q4.
• The Training Division developed a mixed online/virtual classroom training for its 2020 All Supervisor Inservice. This curriculum will be delivered in 2020 Q4. It will meet state requirements for leadership training for all sworn PPB supervisors.

2020 Q4 Update: The Training Division delivered its second New Sergeants Academy during the fourth quarter of 2020. Additional supervisory/command training and training development included the following topics:

• The equity lens training referenced in the quarter three report on this action item was delivered by the Equity and Inclusion Officer, with the support of the Training Division, this quarter. The training was held using both in person and Zoom style formats. It focused on providing command staff (lieutenants and above for both sworn and professional staff) with tools on how to employ the “equity lens” in making daily decisions.
• The Training Division delivered the 2020 Supervisor In-service during this quarter. Due to COVID-19 and budget contraints, this training was delivered in an online format. The training meets state requirements for ongoing leadership training for supervisors.
• The command trainings on contract risk, city agreements and other fiscal topics, which began in Q3, were completed this quarter.

2021 Q1 Update: There was no exclusive “supervisor” training this quarter. However, the PPB has incorporated a sergeant into the incident debrief at the 2021 In-service final “All-Play” scenario. This is a complex scenario involving up to 12 officers and supervisors. The sergeant assists the Patrol Procedure leads in de-briefing supervisor performance at these incidents with an emphasis on reinforcing directive 315.30 Satisfactory Performance generally and in particular 315.30 Section 3 “Supervisor Performance During Critical Incidents.”

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

Friday, May 7, 2021
Audit of training program for Agreement standards requirements

In consultation with the COCL, the Inspector will audit the training program to ensure that PPB meets specific standards as required in the Agreement. See specifics outlined in the Agreement, #85.

Task Date Completed:  
Received DOJ Approval?  
Approval

Evidence of Completion:  
1. PSD SOP #6 (located in folder #70)

Status Note:  
2014 Q1 Update: Inspector awaiting the appointment of COCL to calendar the annual audit of the 7 enumerated performance criteria.

2014 Q2 Update: The Inspector continues to await the appointment of the COCL to conduct this audit of the Training program.

2014 Q3 Update: The Inspector continued to wait for the COCL to be named to conduct this audit as COCL's consultation is required to do so. In the meantime, to aid in satisfying compliance with some of these standards, the Inspector provided the Training Division with force investigations where, in the chain of command review, areas of concern over training, performance or policy were identified. These investigations are tracked and part of the audit will focus on how these cases are incorporated into future training. The Inspector also worked with the Training Division Captain to develop the role of the Use of Force Sergeant within the Training Division as both a liaison to the Inspector and a subject matter expert on force.

2015 Q1 Update: This requires the Inspector, in consultation with the COCL, to complete an audit of the Bureau’s training program using the performance measures specified in the Settlement Agreement. The Inspector completed this audit without input from the COCL in an effort to provide a baseline audit. The audit was completed on May 14, 2015 and forwarded to the Chief of Police for review. The audit report itself serves as supporting documentation of the Bureau’s compliance with this item. Additional items from the Training Division support our assertion of substantial compliance as well.

2015 Q2 Update: The Inspector spoke to the COCL about the role of the Inspector in evaluating the Training Program. The Agreement calls for the Inspector to audit the program to determine if Training has completed certain tasks, such as a yearly needs assessment but it does not call for the Inspector to evaluate the effectiveness of the program as the COCL suggests. While the Inspector may have insight as to the effectiveness of certain aspects of the program such as force investigations, any qualitative analysis would need significant input from the COCL to be meaningful.

2015 Q3 Update: The Inspector already conducted the annual audit of the Training program. However, it is clear from the DOJ's report card and the COCL's quarterly report that the parties have differing opinions as to the scope of the audit required. This discrepancy must be resolved before the next such audit is due. PPB believes that its responsibility is to report whether the designated requirements have been met. The qualitative analyses of those elements that COCL desires is better performed by the COCL and, in fact, are being done pursuant to his analysis of PPB's compliance on other action items including #79 and #80.

2015 Q4 Update: The Bureau’s position on the role the Inspector plays in the audit of the Training Division differs from that of the COCL and DOJ. The Inspector maintains that the agreement calls for the auditing to ensure that the Training Division has completed the tasks listed in this item, but it is NOT the role of the Inspector to opine as the efficacy of their work. The Inspector believes that other relevant paragraphs in the agreement call for the COCL to evaluate the Training Program once the Inspector has ensured the items to be audited are in place. This item has been referred to DOJ for assistance. Thus, at this point the Inspector maintains the audit was completed in 2015 and another is not required until 2016.
2016 Q1 Update: The Inspector met with the COCL on 02/25/16 to discuss the division of labor with regards to the mandated audit of the training program. At issue is who is in the best position to determine compliance with this section. The Inspector can audit whether or not a "comprehensive needs assessment" has been conducted by the Training Division, if the COCL helps craft the methodology for determining what constitutes “comprehensive” so that PPB meets the expectations for compliance. PPB envisions this process much the same as the force audit methodology was created. By jointly developing the yardstick by which to measure compliance with the terms of this section, the Inspector can apply the objective lens of the COCL to render a finding. The COCL can then use the findings and the documents evaluated – the Needs Assessment in this circumstance – to complete the COCL’s other task of evaluating the efficacy of the training program as a whole. This collaboration is key in achieving compliance with this section. The COCL advised they would provide direction after 04/01/16, once they had completed two date-certain reports mandated by the Settlement Agreement.

2016 Q2 Update: The Inspector again met with COCL to discuss the Training Audit and also received actionable information in the form of the COCL’s Training Technical Assistance (TA) Letter. This TA letter provides a starting point from which the Inspector can gather information to inform the audit as to the comprehensiveness of the Training Plan. While not completed in Q2, significant progress was made by COCL in developing a methodology as was done with the force audits outlined in the prior sections.

2016 Q3 Update: PPB awaits the receipt of the proposed methodology for this audit from the COCL. This will serve as the starting point of the discussions and attempts at creating a valid operational tool to utilize to this end. PPB expects more focus on this requirement in the upcoming quarters as the force audit is finalized.

2016 Q4 Update: PPB and COCL continue to work on the methodology for an audit of the training program. They met several times during the quarter to discuss the feasibility of the COCL’s proposed methodology.

2017 Q1 Update: During the first quarter, the review of the COCL’s written consultation contained in the “Training Audit and and Methodology” sent on December 1, 2016 continued as the team explored the most appropriate methodology for performing such an audit, given the constraints of resources and data. The Inspector and Audit team again met with the COCL in January to discuss what the training audit would look like and what measurements should be included. Thereafter, the Audit team conferred with the Training Division analysts to obtain a preliminary understanding of what information/documents are available for the purpose of a training audit. During that meeting, several questions arose that had implications for what the next steps would be in this process. This work is ongoing but the COCL has indicated its intention to focus on this requirement more fully in the next quarter.

2017 Q2 Update: The audit team developed and submitted a methodology for the training audit to DOJ and COCL for review (see supporting documents for the proposed detailed methodology). With approval from the DOJ and COCL, the audit team and Inspector expect to start this audit next quarter.

2017 Q3 Update: The audit team began the training audit in the latter part of this quarter. The audit follows the methodology submitted in the previous quarter to the DOJ and COCL. The final report will be complete and available in the fourth quarter of 2017.

2017 Q4 Update: The audit team completed the training audit and published the final report in the beginning part of this quarter. The audit follows the methodology submitted previously to the DOJ and COCL.

2018 Q1 Update: The audit team awaits receipt of the response to its recommendations in the training audit which is due in Q2 2018. They will then undertake an audit of the changes and report on that in Q4.

2018 Q2 Update: The audit team received and reviewed the Training Division’s response to its audit. It will review the Division’s progress on the recommendations made in that audit in Q3 2018, one year later.

2018 Q3 Update: The audit team spent time this quarter developing the methodology for the follow up audit. It was reviewed and approved in advance by COCL and DOJ so that all are of one mind regarding expectations for its content. The team will be reviewing the progress of the recommendations to the training audit in October and completing their report in Q4 2018.

2018 Q4 Update: The audit team conducted the follow up audit of the Training Division in October and issued a report of its findings which was provided to DOJ and COCL.

2019 Q1 Update: The audit team will consult with the Training Division to evaluate the feasibility of conducting a smaller audit of another aspect of the that Division.
2019 Q2 Update: It was announced that the audit team will move on July 11, 2019 to the newly-created Office of Inspector General (OIG) in anticipation of conducting internal audits. The OIG will consult with the Chief and the Training Division to determine when another audit of a different aspect of that Division will be done in the future.

2019 Q3 Update: There is no other Training audit anticipated to be conducted in the near future. The team is currently engaged in one of IA. That will be followed by a compliance assessment of EIS and BHU as part of PPB's maintenance year plan.

2019 Q4 Update: The OIG will consult with the Chief and the Training Division to determine when another audit of a different aspect of that Division will be done in the future.

2020 Q1 Update: No further auditing of the Training Division occurred this quarter.

2020 Q2 Update: No further auditing of the Training Division occurred this quarter.

2020 Q3 Update: No further auditing of the Training Division occurred this quarter.

2020 Q4 Update: Ongoing civil unrest and personnel constraints have limited the bandwidth of the audit team in the third and fourth quarters of 2020. Additional consultation will be necessary to determine when further audits will be completed in the future.

2021 Q1 Update: The OIG will consult with the Chiefs Office and Training Division in order to determine a suitable time to discuss future audits, the last of which was held in 2018.

2021 Q2 Update: 

2021 Q3 Update: 

2021 Q4 Update: 

2022 Q1 Update: 

2022 Q2 Update: 

2022 Q3 Update: 

2022 Q4 Update: 

Friday, May 7, 2021
Department of Justice Tasks / Quarterly Update Report

Task Description
Thirty day advance notice to members of policy changes

Task Requirements:
The Inspector will audit the training program to ensure that sworn PPB members are provided a copy of all PPB directives and policies issued pursuant to the Agreement, and sign a statement acknowledging that they have received, read, and had an opportunity to ask questions about the directives and/or policies, within 30 days of the release of the policy.

Status: Actively in Process

Action Steps:
1. PPB will identify how to monitor review of Agreement and resulting policies and confirmation of understanding by PPB personnel.
2. PPB will ensure timely fulfillment of this expectation by all PPB personnel.
3. Inspector will audit PPB tracking of this requirement to ensure compliance.

Task Date Completed: 85(g)

Evidence of Completion:
1. Inspector SOP #5

Status Note:

2014 Q1 Update: Directive process implemented wherein all PPB are notified electronically of issuance of new and revised policies and electronic process in place for officers to acknowledge receipt and understanding of contents.

2014 Q2 Update: The acknowledgment process was utilized for the first time with enactment of Dir. 010.00 and will be followed from hereon in.

2014 Q3 Update: Strategic Services Division and Communications staff are responsible for overseeing this electronic process. The Compliance team receives a report at the end of the 30 day acknowledgment period of those in the Bureau who have not fulfilled this mandate and an explanation thereafter by supervisors of the reason for the failure. Inspector was provided with reports on the Bureau's compliance with this requirement on each of the Directives that were enacted during this quarter. The results will be available for the audit that will be performed after COCL is named.

2014 Q4 Update: The electronic process for notice and acknowledgment is fully operationalized at this point and a system in place for supervisors to address any failure to comply. A report is received from Communications office which is available to the Inspector when he is ready to proceed with the audit of this standard. It is anticipated that now that the COCL has been appointed, work on all the auditing function will begin next quarter.

2015 Q1 Update: The electronic notice and acknowledgment process was utilized for the 9 directives that were enacted this quarter. The Communications staff provided the compliance report to the DOJ team which indicated that 97.5% of employees acknowledged the policies within that 30 day window.

2015 Q2 Update: The electronic notice and acknowledgment process continues to be used to assure officers' knowledge of new directives. This quarter nine directives were enacted. The compliance report for this process indicated that 97.75% of employees acknowledged the required policies within the 30 day time frame. Of the 2.25% outstanding, most of those individuals were on leaves of various types (FMLA; military) and thus were excused until return to duty.

2015 Q3 Update: During the third quarter four DOJ-related directives were enacted. The compliance report for this process showed that an average of 97.5% of PPB employees acknowledged those required policies in the 30 day time frame. Of the 2.5% who did not comply, most all were on some type of approved leave during the particular period so were not in a position to do so as they were not at work.

2015 Q4 Update: In the fourth quarter, three DOJ-related directives were enacted. However, due to timing only one was due to be acknowledged before Dec. 31, 2015. The compliance report showed that 97.8% of PPB employees acknowledged that directive within the 30 day timeframe. Of the 2.2% who did not comply, most were on some type of approved leave during the particular period so were not in a position to do so as they were not at work.

2016 Q1 Update: In the first quarter of 2016, no DOJ-related directives were enacted. However, the deadlines for acknowledging two that were enacted last quarter--344.05 and 310.00-- fell in the first quarter. The compliance report shows that 97.6% of PPB employees
Department of Justice Tasks / Quarterly Update Report

acknowledged that directive within the 30 day timeframe.
Of the 2.4% who did not comply, most were on some type of approved leave during this particular period so were not in a position
to do so as they were not at work.

2016 Q2 Update: During the second quarter of 2016, one DOJ-related directive--416.00--was enacted. This occurred in May with a June 3, 2016
deadline for acknowledgement. The compliance report shows that 97% of PPB employees acknowledged that directive within the
30 day timeframe.
Of the 3% who did not comply, most were on some type of approved leave during this particular period so were not in a position
do so as they were not at work.

2016 Q3 Update: In the third quarter, Directive 850.20 Police Response to Mental Health Crisis was enacted. The compliance report shows that 95%
of PPB employees acknowledged this directive within the 30 day time period. Of those who did not comply, most were on some
type of approved leave during this particular period so were not in a position to do so as they were not at work.

2016 Q4 Update: In the fourth quarter, one DOJ-related directive (1500.00 Training) was enacted. The compliance report indicates that 97% of PPB
employees acknowledged this directive within the 30-day time period. Of those who did not comply, most were on some type of
approved leave during this particular period so were not in a position to do so as they were not at work. The Assistant Chief of
Operations was notified of the few members who missed the timelines and were not excused from this requirement. The AC sent a
written reminder to Operations branch command staff of the importance of meeting these timelines.

2017 Q1 Update: During the first quarter of 2017, one DOJ-related directive (345.00 Employee Information System) was enacted. The compliance
report indicates that 97% of PPB employees acknowledged this directive within the 30-day time period. Of those who did not
comply, the majority were on some type of approved leave and not at work to complete the task.

2017 Q2 Update: During this quarter, three DOJ-related directives (850.21, .22 and .25) were enacted. The compliance report shows that 97% of
PPB employees acknowledged these directives within the 30 day time period. Of those who did not comply, the majority were on
some type of approved leave and were not at work to perform this task.

2017 Q3 Update: In the third quarter, seven DOJ-related directives were enacted by the Bureau. The compliance report indicates that between 94%-
97% of PPB employees acknowledged these various directives within the 30 day time period. Of those who did not comply, the majority were on
some type of approved leave and were not at work to perform this task. The vast majority of those individuals
fulfilled this requirement upon return to work.

2017 Q4 Update: There were no DOJ-related directives enacted this quarter so there is no compliance report to provide.

2018 Q1 Update: In the first quarter of 2018, there were three DOJ-related directives that were enacted by the Bureau. The compliance report
indicates that between 95%-97% of PPB employees acknowledged these directives within the 30 day time period. Of those who
did not comply, the majority were on some type of approved leave and were not at work to perform this task. The vast majority of
those individuals fulfilled this requirement upon return to work.

Based upon the request of DOJ, the Bureau is exploring some technological way to track who those individuals were, when they
returned to service, and exactly what date they completed the task of acknowledging outstanding directives.

2018 Q2 Update: There were no DOJ-related directives enacted this quarter so there is no compliance report to provide.

2018 Q3 Update: There were no DOJ-related directives enacted this quarter so there is no compliance report to provide.

2018 Q4 Update: In this quarter, the four mental health-related directives, 850.20, 850.21, 850.22 and 850.25 as well as Training Directive 1500.00
were enacted. The compliance report indicates 100% of the PPB employees who were required to do so did acknowledge these
directives in a timely manner. This task is now generated from and tracked in LMS which provides more consistency in notice and
reminders.

2019 Q1 Update: There were no DOJ-related directives enacted this quarter so there is no compliance report to provide.

2019 Q2 Update: There were two DOJ-related directives enacted this quarter, 345.00 EIS and 416.00 Critical Incident-Temporary Altered Duty. The
compliance report indicates that 97.3% of PPB employees who were required to do so did acknowledge both of these directives in a
timely manner.
The missing 2.7% did so but not within the required window of time.
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2019 Q3 Update: There was one DOJ-related directive-1501.00 Field Training Evaluation Program- enacted in the third quarter. Ninety-seven percent of PPB employees who were required to do so did acknowledge both of these directives in a timely manner. All but one person of the outstanding 3% have read and acknowledged but not within the 30 day time frame.

2019 Q4 Update: There were no DOJ-related directives enacted this quarter so there is no compliance report to provide.

2020 Q1 Update: There were three DOJ-related directives enacted this quarter, 1010.00 Use of Force; 1020.00 Weapons Administration; and 1021.00 Weapons Qualifications.

Ninety-six percent of PPB employees who were required to do so did acknowledge these directives in a timely manner. All but one of those outstanding have read and acknowledged but not within the 30 day time frame set by PPB.

2020 Q2 Update: There were 19 DOJ-related directives enacted this quarter. Between 96% and 99% of PPB employees who were required to do so did acknowledge them in a timely manner. All but one of those outstanding have read and acknowledged but not within the 30-day time frame.

2020 Q3 Update: There were no DOJ-related directives enacted this quarter so there is no compliance report to provide.

2020 Q4 Update: There were four DOJ-related directives-the mental health suite--enacted this quarter.

For each of those directives, 94% of PPB employees who were required to do so did acknowledge the directives in a timely fashion. All of those outstanding have read and acknowledged but not within the 30 day time frame set by PPB.

2021 Q1 Update: There were no DOJ-related directives enacted this quarter so there is no compliance report to provide.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:

Friday, May 7, 2021
Task Description
Inspector presents use of force patterns and trends to Training Division, Chief, TAC.

Task Requirements:
In consultation with the COCL, the Inspector shall gather and present data and analysis on a quarterly basis regarding patterns and trends in officers' uses of force to the Chief, the PPB Training Division, and to the Training Advisory Council. The Training Division and Training Advisory Council shall make written recommendations to the Chief regarding proposed changes in policy, training, and/or evaluations based on the data presented. The Inspector shall also, in coordination with the COCL and PSD, identify problematic use of force patterns and training deficiencies. The Chief's Office shall assess all use of force patterns identified by the Training Division and/or Training Advisory Council and timely implement necessary remedial training to address deficiencies so identified.

Status Complete - review ongoing

Action Steps:
1. PSD will develop SOP for Investigator position including details for review and tracking of use of force
2. Inspector will present quarterly analysis of force data and trends to various stakeholders and decision makers
3. Training Advisory Council will establish subcommittee to review use of force data and trends
4. Inspector will report on problematic use of force patterns and training deficiencies

Task Date Completed: 11/5/2013

Evidence of Completion:
1. PSD SOP #6 (located in folder #70)
2. Quarterly Force Reports (located in folder #74)
3. Training Advisory Council Task Force one-pager
4. Emails from Lt. Jim Dakin

Status Note:
2014 Q1 Update: The Inspector made a presentation to the TAC's quarterly meeting re: force data.

2014 Q2 Update: While awaiting the appointment of the COCL, the Inspector did provide force data on the last quarter to the Training Division and the TAC subcommittee in person as well as to the general membership through email since it did not hold a regular quarterly TAC meeting due to the opening reception of the new Training Center.

The Inspector forwarded any After Action that raised question of problematic use of force or training deficiencies to the Training Captain and Lieutenant.

2014 Q3 Update: The Inspector continues to await consultation with the COCL before he identifies and reports on problematic use of force patterns and training deficiencies. The COCL has now been selected and a day-long meeting has been set for the third week in January. It is expected that action on this will begin next quarter after the Inspector has the opportunity to bring the COCL up to speed on his work thus far.

2015 Q1 Update: The TAC’s quarterly meeting occurred one week prior to the completion of this audit report so it will be presented at a future meeting. As with prior quarterly reports, upon approval by the Chief of Police, the trend analysis included in this audit report will be forwarded electronically to the Training Division Captain for distribution to the members of the TAC.

2015 Q2 Update: The second quarter 2015 data is not complete so no reports have been authored. When the dataset is reliable and accurate, the analysis will begin and reports will be written according to the requirements of Item 86. They will then be forwarded to members of the TAC as is the practice.

The new Records Management System (RMS) has delayed reporting as the Bureau works through issues relating to data collection. The Inspector's Office is working with Records and the RegJIN team to address the issues as quickly as possible.

2015 Q3 Update: The Inspector has requested consultation with the COCL regarding this section of the Settlement Agreement and as of October 16, 2015 this has not occurred. The Inspector is also concerned with the inconsistency in the DOJ's technical assistance in Items 85 and 86. In #85 DOJ directs COCL to consult with the Auditor and in #86 to consult with the Inspector. The Inspector requests clarification.
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**2015 Q4 Update:** COCL has not yet consulted with the Inspector on this item as requested by PPB and required by the Settlement Agreement. As was the case with the prior audit, the Inspector will proceed under the presumption that COCL does not intend to consult in advance, only comment on the product. If that presumption is incorrect, the Inspector is prepared to complete this task in close consultation with COCL, and develop an audit that achieves the goal of informing the Bureau on the efficacy of the training program.

**2016 Q1 Update:** The COCL provided feedback on the content and format of the force report so that has been revised and expanded. The report is provided to the Training Division and the TAC as soon as it is issued on a quarterly basis. The Training Manager and Assistant Chief review that information, as well as other sources, in determining the subjects/materials to be addressed in the next In-Service training to be held in September. The Inspector is awaiting sufficient longitudinal data to analyze possible patterns or trends regarding the use of force so that it is a meaningful analysis for the Bureau.

**2016 Q2 Update:** The Inspector presented force data at the May 11, 2016 Training Advisory Council. As noted in the prior quarter, the Inspector is awaiting sufficient longitudinal data to analyze possible patterns or trends regarding the use of force so that it is a meaningful analysis for the Bureau which will then be shared with the TAC.

**2016 Q3 Update:** The Inspector presented the second quarter force data to the TAC on September 14, 2016. Prior to the meeting, the Co-chair had indicated the committee's desire for the Inspector to focus his remarks on force events that involved the use of 3 or more Taser applications. Discussed the lack of any trend in its use at this point because only sample of 14 uses reviewed.

**2016 Q4 Update:** As noted in previous paragraph, the Inspector appeared at the TAC meeting and presented on the quarterly force report. In addition, the Inspector forwarded any After Action reports that identified perceived patterns of problematic uses of force or training deficiencies to the Training Division.

**2017 Q1 Update:** As reported in the previous paragraph, the Inspector presented the 3rd quarter force report to the TAC on January 11, 2017. Further, the Inspector forwarded reports or information regarding perceived problematic uses of force or training deficiencies to the Training Division for its review and consideration of follow up.

**2017 Q2 Update:** As reported in the previous paragraph, the Inspector presented the 4th quarter force report to the TAC on May 10, 2017. Further, the Inspector forwarded reports or information regarding perceived problematic uses of force or training deficiencies to the Training Division for its review and consideration of follow up.

**2017 Q3 Update:** As reported previously, the Inspector presented the 2017 1st quarter force report to the TAC on September 13, 2017. Further, the Inspector forwarded reports or information regarding perceived problematic uses of force or training deficiencies to the Training Division for its review and consideration of follow up.

**2017 Q4 Update:** As reported in the previous paragraph, the Inspector presented the 2017 2nd quarter force report to the TAC on November 8, 2017. Further, the Inspector forwarded the reports or information regarding perceived problematic uses of force or training deficiencies from the previous quarter that had been sent to the Training Division for its review and consideration of follow up.

**2018 Q1 Update:** On January 10, 2018, the Inspector presented the 3rd quarter force report of 2017 to the TAC and discuss the open data portal being worked on by the force audit team that will allow the public to review and analyze PPBs force data on their own. Additionally, the Inspector met with the TAC on March 14, 2018 to discuss the addition of force audit results that in the future will be presented to the TAC in conjunction with the force data.

**2018 Q2 Update:** At the May 9, 2018 TAC meeting, the Inspector presented the 1st quarter force report of 2018 to the TAC and demonstrated the public open data portal that went live this quarter. This new development allows the public to analyze the force data on their own.

**2018 Q3 Update:** At the Sept 12, 2018 meeting, the Inspector’s staff presented the 2018 Quarter 2 force report to the TAC, explained the use of force audit process and answered members' questions.

**2018 Q4 Update:** At the November meeting, the analyst presented the 2018 Q3 force report to the TAC and answered the members' questions.

**2019 Q1 Update:** On March 13th, 2019, the Inspector’s staff presented the 2018 4th quarter force report to the TAC, explained the use of force audit process and answered members' questions.

**2019 Q2 Update:** The Inspector was not invited to present to TAC this quarter. However, he is on the July 10th agenda to present the 2019 Quarter 1 force report and answer questions from the committee members.
The Inspector presented the 2019 Q1 force report to the TAC on July 10, 2019. On September 11th, 2019, at the request of the TAC, the OIG analysts presented the Training Division Audit from 2017 and 2018.

On November 13, 2019 the Force Inspector presented the Q2 Force Report and information to the Training Advisory Council.


Due to COVID-19, one of the TAC meetings normally held this quarter did not take place. Once the virtual meeting was set up for the next meeting, the TAC had other pressing items for their agenda. So it was agreed that the Force Inspector would present two quarters' worth of data at the July meeting.

The TAC held two public meetings, one on July 8th and the other September 9th, during the third quarter. The use of Force report was presented at the July meeting.

Reminder emails with the agenda included was sent to the public email distribution list before the meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website

The TAC held one public meeting this quarter on November 11, 2020. The use of force report was presented at this meeting.

The TAC held two public meetings (via Zoom) on January 13 and March 10 of 2021. Information on these meetings are available at: https://www.portlandoregon.gov/police/78362. Due to a miscommunication by the Chair, the Force Inspector was not on the agenda for the March meeting so will give the fourth quarter report at the May meeting.
Department of Justice Tasks / Quarterly Update Report

Task Description
Inspector presents use of force patterns and trends to Training Division

Task Requirements: In consultation with the COCL, the Inspector shall gather and present data and analysis on a quarterly basis regarding patterns and trends in officers' uses of force to the Chief, the PPB Training Division, and to the Training Advisory Council. The Training Division and Training Advisory Council shall make written recommendations to the Chief regarding proposed changes in policy, training, and/or evaluations based on the data presented.

Status Actively in Process

Action Steps:

Task Date Completed: ☐ Received DOJ Approval? Approval

Evidence of Completion:

2014 Q1 Update: Inspector presented annual report to TAC at April quarterly meeting. Introduced new Inspector to the group.

2014 Q2 Update: TAC did not hold its usual quarterly meeting as it attended the Grand Opening of the new Training Center as a group with other advisory groups. The Inspector did send the previous quarter's force report to the Training Division Captain who emailed it to TAC members.

2014 Q3 Update: The TAC met on November 6, 2014. The Inspector gave a PowerPoint presentation to the group regarding his role and responsibilities as well as a summary of force issues. The Inspector also attends the TAC's subcommittee on use of force as often as his schedule allows.

2014 Q4 Update: The 3rd quarter force reports were provided to the Training Division and posted to the Bureau website on December 11, 2014. They were forwarded by the Training Division to the TAC on December 18, 2014. Upon review, this system seemed inefficient so the Inspector requested and received direct access to TAC email list so this information can be sent directly.

2015 Q1 Update: The Inspector provided the Q2 and Q3 2015 force reports to the Training Division Captain with a request to forward them to the Training Advisory Council (TAC) in anticipation of the Inspector's presentation of a report at the next scheduled meeting of the TAC in January of 2016.

2015 Q2 Update: The 2015 second quarter data is not complete so no reports have been authored. This is due to delays resulting from RegJIN implementation. When the dataset is reliable and accurate, the analysis will be conducted and reports will be written according to this requirement.

2015 Q3 Update: The revised 2015 second quarter force report was finally completed in early October and was sent to COCL for review of new content and format. The COCL provided feedback at end of October which PPB incorporated and then returned to COCL for final approval. The Inspector will present this information to the TAC as soon as the report is posted and TAC's agenda permits although comments on patterns and trends will await enough longitudinal information.

2015 Q4 Update: The Inspector provided the Q2 and Q3 2015 force reports to the Training Division Captain with a request to forward them to the Training Advisory Council (TAC) in anticipation of the Inspector's presentation of a report at the next scheduled meeting of the TAC in January of 2016.

2016 Q1 Update: The Training Advisory Council (TAC) now meets bi-monthly. The Inspector was unable to attend the scheduled meeting of the TAC due to vacation leave. While the material is available on the Bureau's website and was sent to TAC members, the Settlement
Agreement calls for a presentation. The Inspector is now slated to report to the TAC in early May and will present both the Q4 2015 and Q1 2016 data at that time.

2016 Q2 Update: The Inspector presented force data at the May 11, 2016 Training Advisory Council meeting.

2016 Q3 Update: The 2016 Q2 Force report was sent to TAC members per protocol. A TAC meeting was scheduled for September 14, 2016. On Sept. 7th, Capt. Krantz, the new Inspector, received a request from the TAC Co-chair asking that the Captain focus his presentation on force involving Taser applications. The two met to further discuss the specific request.

At the Sept. 14th TAC meeting, Capt. Krantz presented a brief summary of the quarterly force data and then focused on a deeper discussion on the use of the Taser, concentrating on applications of 3 or more cycles.

A question and answer period followed which covered Taser use as well as the increase in the number of officer injuries that the PPB is experiencing. The meeting concluded with the Co-chair indicating that it had been a most productive and informative session.

2016 Q4 Update: The 2016 Q3 Force Report was sent to TAC and posted on the Bureau's website. The bi-monthly meeting schedule did not allow for a presentation of the report this quarter; however, it is on the agenda for the meeting on January 11, 2017.

2017 Q1 Update: The Inspector's presentation on the Q3 force report was made to TAC on February 8, 2017 as the January meeting had to be rescheduled due to snow.

The 2016 Q4 Force Report was sent to TAC and posted on the Bureau's website this quarter. The Inspector will make a presentation on that Q4 report at the TAC's May meeting.

2017 Q2 Update: On May 10, 2017 the Inspector attended the TAC meeting and presented the Q4 force report.

The 2017 Q1 Force report was sent to TAC and posted to the Bureau's website during this quarter.

2017 Q3 Update: The Inspector presented the 2017 Q1 force report to the TAC on September 13, 2017.

The 2017 Q2 Force report was sent to TAC and posted to PPB's website during this quarter.

2017 Q4 Update: The Inspector presented the 2017 2nd quarter force report to the TAC on November 8, 2017.

Further, the Inspector forwarded to the TAC quarterly force report as well as the reports or information regarding perceived problematic uses of force or training deficiencies from the previous quarter that had been sent to the Training Division for its review and consideration of follow up.

2018 Q1 Update: On January 10, 2018, the Inspector presented the 3rd quarter force report of 2017 to the TAC and discussed the open data portal being developed by the force audit team that will allow members of the public to review and analyze PPB's force data on their own.

Additionally, the Inspector attended the TAC meeting on March 14, 2018 to discuss the addition of force audit result that in the future will be presented to the TAC in conjunction with the force data.

2018 Q2 Update: On May 9, 2018, the Inspector presented the 1st quarter force report of 2018 to the TAC and demonstrated the public open data portal that was discussed at a previous meeting and was activated this quarter.

2018 Q3 Update: On Sept 12, 2018, the Inspector’s staff presented the 2nd quarter force report of 2018 to the TAC, explained the use of force audit process and answered their questions.

2018 Q4 Update: At the November TAC meeting, the Inspector and analyst appeared. The analyst reviewed the use of force for Q3. The Inspector then discussed Crowd Control tactics and the use of force in those situations at the request of the TAC and answered members questions.

2019 Q1 Update: On March 13th, 2019, the Inspector’s staff presented the 2018 4th quarter force report to the TAC, explained the use of force audit process and answered members’ questions.

2019 Q2 Update: The Inspector did not present to the TAC this quarter but is on the July 10, 2019 agenda to discuss the 2019 Q1 force report.

2019 Q3 Update: The Inspector presented the 2019 Q1 force report to the TAC on July 10, 2019.

On September 11th, 2019, at the request of the TAC, the OIG analysts presented the Training Division Audit from 2017 and 2018.
On November 13, 2019, the Force Inspector presented the Q2 Force Report and information to the Training Advisory Council.

At the January 8, 2020 meeting, the Force Inspector presented the Q3 Force Report and information to the Training Advisory Council (TAC).

The Force Inspector did not present to the TAC this quarter but will report on both Q4 and Q1 at the July meeting.

The Force Inspector presented on both the Q4 and Q1 force reports at the July TAC meeting.

The presentation by the Force Inspector was made at the November 11, 2020 TAC meeting.

Due to a miscommunication with the TAC and its Chair, the Force Inspector, who was in attendance, did not present his Q3 report at the March meeting. Once the mistake was discovered, the presentation was rescheduled for the May meeting.
### Task Description
Open Public Training Advisory Council Meetings

### Task Requirements:
Training Advisory Council meeting will be open to the public unless the matter under discussion is confidential or raises public safety concerns, as determined by the Chief.

### Status
Completed - Closed

### Action Steps:
1. Training will inform Training Advisory Council that their meetings will be open to the public
2. Training will advertise TAC meeting times and locations on the PPB website so that interested community members can attend

### Task Date Completed: 2/17/2013

### Received DOJ Approval?
Approval

### Evidence of Completion:
1. TAC meetings published in advance online (available online)
2. TAC Quarterly meeting schedule

### Status Note:
2014 Q1 Update: TAC held public meeting on Feb. 20, 2014
2014 Q2 Update: TAC held public quarterly meeting on May 1, 2014
2014 Q3 Update: TAC substituted attendance at the Grand opening of the new Training Center for its quarterly meeting in September.
2014 Q4 Update: TAC held a public meeting on November 6, 2014.
2015 Q1 Update: TAC held its quarterly meeting on February 5, 2015. Training staff gave a presentation on the 2014 Needs Assessment and overviews on both the 2015 In-Service Overview and Tourniquet/Tactical Emergency Casualty Care that will be covered. The members established 2 new task forces--one on membership for application review and the other on scenario review.
2015 Q2 Update: The TAC did not hold a meeting during this quarter as it was set for July 8, 2015.
2015 Q3 Update: The TAC held its quarterly meeting on July 8, 2015. The agenda included a detailed presentation on the Needs assessment process by the analyst charged with preparing it, a discussion on the citizens' academy that is planned for TAC members' benefit, and a steering committee update.
2015 Q4 Update: Since the last quarter, the TAC decided to increase its meeting schedule to once every other month rather than quarterly. So TAC held its first bi-monthly meeting on November 10th. A reminder email with the agenda attached was sent to the newly developed email list before the meeting. The agendas for meetings are also posted on the PPB website, http://www.portlandoregon.gov/police/61449. The next meeting is scheduled for January 13th, 2016.
Below are some of the highlights of the work completed by TAC members this quarter:
- In addition to the monthly steering committee meetings, a self-selected group (everyone was invited) of TAC and PPB Training Division members met four evenings in October and November to work on a long-term strategic plan lead by TAC member Sushanah Boston. The goal of the meetings was to identify members' interest in various training topics and to develop a calendar of meaningful projects. See supporting documents for the summaries of each of those meetings.
- In October, the newest TAC members were invited to participate in eight hours of civilian training with Portland Police Bureau instructors to better understand the work done by the Training Division and some of the challenges faced by officers on patrol. Each TAC member was partnered with a patrol officer which allowed for the opportunity to develop a relationship and ask questions.
- Six members will complete their term and service to the committee in February. Planning has begun for the next round of recruitment which will commence in early 2016. There will be a focus on recruiting new members representing the diversity of Portland.
- The TAC outreach subcommittee participated in one community event during the fourth quarter (and two during the third quarter not yet previously reported) to inform and receive public input.

2016 Q1 Update: During the first quarter of 2016, the Training Advisory Council (TAC) held two public meetings based on new schedule--one on January 13th and the other March 9th. A reminder email with the agenda included was sent to the public email distribution list
before both meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on there. The next meeting is scheduled for May 11th, 2016.

Below are some of the highlights completed by TAC members.

• At the January 13th public meeting, the TAC members were presented with the Use of Force Policy Class. This was the same class given to the Portland Police Bureau members at In-Service 2015. It was followed by a presentation by the Inspector on the Use of Force Quarterly Report. The goal of the first item was to provide an opportunity for TAC members to gain an in-depth understanding of the policy and ask questions of a subject matter expert in order increase their comprehension of the use of force data. The PPB reiterated that it is seeking written recommendations to the Chief regarding proposed changes in policy, training, and/or evaluation based on the data presented in accordance with item 86 of the agreement.

• To further identify training recommendations, TAC members were invited to review curricula focused on use of force, decision-making, and customer service. Members were provided multiple opportunities to access the lesson plans over a two week period. It was followed up by a question and answer meeting on February 24th, 2016. The meeting was attended by six TAC members and nine Training Division members comprised of instructors, command, and curriculum development staff.

• The TAC members discussed with the full TAC and public their findings and next steps at the March 9th meeting.

• Several members completed their service term and rolled off of the committee in February. Two committees were formed to identify new candidates: recruitment outreach and selection. The first phase of selection for new members has been completed; background checks are currently being conducted.

2016 Q2 Update:

During this quarter of 2016, the Training Advisory Council (TAC) held one public bi-monthly meeting on May 11, 2016. A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found there. The next meeting is scheduled for July 13th, 2016.

Quarter two Training Advisory Council highlights:

• The TAC submitted a report with training recommendations entitled, 2016 TRAINING AND USE OF FORCE REPORT RECOMMENDATIONS. The report is posted for public viewing on the TAC website, http://www.portlandoregon.gov/police/article/581581. It is a compilation of the advisory work the TAC has been involved with over the past year. The report includes feedback on the Use of Force data, in accordance with item 86 of the agreement.

• The new TAC members will officially begin their two year volunteer term of service at the next July 13th meeting. The previous chair has completed his term of service and two new co-chairs were elected.

2016 Q3 Update:

During the third quarter, the Training Advisory Council (TAC) held two public bi-monthly meetings, one on July 13 and the other September 14, 2016. A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website. The next meeting is scheduled for November 9, 2016.

Quarter three Training Advisory Council highlights:

• The new TAC members officially began their two year volunteer term of service at the July 13th meeting. New members will receive hands-on training on October 19th and 26th.

• At the July 13th meeting, Co-Chair Boston and Captain Parman spoke to the interaction between the TAC Members and community members who worked on and provided feedback on the training report that was submitting during the previous quarter. The report, 2016 Training and Use of Force Report Recommendations, can be found here: http://www.portlandoregon.gov/police/article/581581

• On September 14th, Chief Marshman released a written response to the TAC report. Due to an already full agenda for the meeting on the 14th, the response will be covered in detail at the November 9th meeting. Also at the upcoming meeting, the annual Needs Assessment report will be presented. An overview of how the recommendations from the Training Advisory Council are utilized within the Needs Assessment was provided at the September 14th meeting.

• The September 14th meeting invited members from other Portland Police advisory groups to participate in a discussion about how
the groups can improve communication and collaboratively work together in their efforts to advise PPB. Also at this meeting the Inspector presented the most recent Use of Force report, 2016 Quarter 2. The Training Advisory Council is working on a response to be delivered to the Chief at a future date.

Below is the schedule of future Inspector Force Report presentations:

<table>
<thead>
<tr>
<th>Date</th>
<th>Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 14, 2016</td>
<td>Force Report 2016 Q2</td>
</tr>
<tr>
<td>November 9, 2016</td>
<td>NA</td>
</tr>
<tr>
<td>March 8, 2017</td>
<td>NA</td>
</tr>
<tr>
<td>May 10, 2017</td>
<td>Force Report 2016 Q4</td>
</tr>
<tr>
<td>July 12, 2017</td>
<td>Force Report 2017 Q1</td>
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</tbody>
</table>

**2016 Q4 Update:** During the fourth quarter, the Training Advisory Council (TAC) held one public bi-monthly meeting on November 16, 2016. A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website; however, minutes from the November meeting have not yet been approved.

Quarter four Training Advisory Council highlights:
• Chief Marshman's September written response to the TAC Report was discussed.
• Training Development Analyst Emma Covelli presented the 2016 Needs Assessment.

**2017 Q1 Update:** During the first quarter of 2017, the Training Advisory Council (TAC) held two bi-monthly meetings which were open to and attended by the public. A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website.

On February 8th, the Use of Force Quarterly Report was presented. This meeting replaced the January meeting which was cancelled due to inclement weather. The March 8th meeting focused on learning about the Electronic Control Weapon program for recommendations.

The next meeting is scheduled for May 10, 2017.

**2017 Q2 Update:** During this quarter, the Training Advisory Council (TAC) held one public bi-monthly meeting on May 10, 2017. At this meeting the 2016 Q4 Use of Force Quarterly Report was presented. The remainder of the meeting focused on developing recommendations for the TAC annual report.

A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings were also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website.

The next meetings are scheduled for July 12, September 13 and November 8, 2017.

**2017 Q3 Update:** During the third quarter of 2017, the Training Advisory Council (TAC) held two public bi-monthly meeting on July 12 and September 13, 2017. At the September meeting the 2017 Q1 Use of Force Quarterly Report was presented.

A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings were also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website. The next meeting is scheduled for November 8, 2017.

**2017 Q4 Update:** During the fourth quarter of 2017, the Training Advisory Council (TAC) held one public bi-monthly meeting on November 8, 2017. At the meeting the 2017 Q2 Use of Force Quarterly Report was presented.

A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the
meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website.

2018 Q1 Update: During this quarter, the Training Advisory Council (TAC) held two public bi-monthly meetings, one on January 10 and the other March 14, 2018. The January meeting welcomed six new members. The Inspector presented on the Use of Force reports at both meetings.

A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website.

2018 Q2 Update: During the second quarter of 2018, the Training Advisory Council (TAC) held one public bi-monthly meeting on May 9, 2018. The Inspector presented on the Use of Force report. Additionally a new chair was elected due to the current co-chairs completing their term.

A reminder email with the agenda included was sent to the public email distribution list before the meeting. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Minutes from past meetings can also be found on the website.

2018 Q3 Update: During the third quarter of 2018, the Training Advisory Council (TAC) held two public bi-monthly meetings on July 11 and September 12.

During the July meeting, the TAC formally accepted and presented their 2017 Recommendation Report. They also provided feedback on the In-Service 2018-2 Implicit Bias curriculum. Their written comments on Implicit Bias class, along with the Training Division’s response, is included in the supporting documents.

During the September meeting, the Use of Force Report data for 2018 Q1 and Q2 was presented and the TAC members updated and approved the TAC bylaws.

Reminder emails with the agenda included were sent to the public email distribution list before the meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website.

2018 Q4 Update: During this quarter, the Training Advisory Council (TAC) held one public bi-monthly meeting on November 14. The Use of Force report was presented.

In addition, during this time period members were provided two opportunities to view the 2018-3 In-Service Procedural Justice class. At the time of this report, the written feedback is still being finalized, but will be posted to the TAC website once complete.

The annual recruitment for new members was open from November 1 to December 10. A subcommittee is currently reviewing the applications. The seven person selection subcommittee is comprised of four TAC members and three PPB members.

A reminder email with the agenda included was sent to the public email distribution list before the meetings. The agendas for all meetings are posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website.

2019 Q1 Update: During the first quarter of 2019, the Training Advisory Council (TAC) held two public meetings, one on January 9 and the other on March 13.

The Use of Force report was presented at the March meeting. New members were invited to attend this meeting; however, several members are still in the background process.

Reminder emails with the agenda included were sent to the public email distribution list before the meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Transcripts from
2019 Q2 Update: In the second quarter, the Training Advisory Council (TAC) held one public bi-monthly meeting on May 8. Highlights of the meeting include:

• Chair Campbell led a presentation entitled An Overview of Police Work in Portland. Slides from the presentation can be found on the Portland Police Bureau TAC website, https://www.portlandoregon.gov/police/article/731481.

• The Office of Equity and Inclusion provided a program update and expressed interest in continuing to work together. TAC members were invited to the second annual Equity Retreat on June 20th.

• Two Task Forces presented their training recommendation reports:
  - Establishing an Effective Wellness Program - https://www.portlandoregon.gov/police/article/731482

On June 29th, new members of the TAC were invited to attend the Community Academy training. Six members attended.

A Reminder email, with the agenda included, was sent to the public email distribution list before the meeting. The agenda for the meeting was also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website.

2019 Q3 Update: During the third quarter of 2019, the Training Advisory Council (TAC) held two public bi-monthly meetings, on July 10 and September 11.

The Use of Force Report and Needs Assessment Overview were presented at the July 10 meeting. The 2017 Training Audit was presented at the September 11 meeting.

The TAC also finalized their recommendations on Emotional Intelligence, and reviewed their recommendations on the HQPT Wellness Presentation and Procedural Justice Scenario for 2019 in-service.

Reminder emails with the agenda included were sent to the public email distribution list before the meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, https://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website.

2019 Q4 Update: In this quarter, the Training Advisory Council (TAC) held one public meeting on November 13, 2019.

The Use of Force report was presented at this meeting, as well as an update from the PPB’s Office of Equity and Diversity.

Reminder emails with the agenda included was sent to the public email distribution list before the meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, https://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website.

2020 Q1 Update: The TAC held two public meetings, one on January 8th and the other March 11th, during the first quarter. The use of Force report was presented at the January meeting.

Reminder emails with the agenda included was sent to the public email distribution list before the meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, https://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website.

2020 Q2 Update: The TAC would normally have met once this quarter. However, due to COVID 19, the May meeting was cancelled as the arrangement for a virtual meeting could not be completed before the scheduled date. However, the steering committee did meet via Zoom in June to plan the agenda for the July public meeting.
Department of Justice Tasks / Quarterly Update Report

2020 Q3 Update: The TAC held two public meetings, one on July 8th and the other September 9th, during the third quarter. Reminder emails with the agenda included were sent to the public email distribution list before the meetings. The agendas for the meetings are also posted on the Portland Police Bureau Website, http://www.portlandoregon.gov/police/61449. Transcripts from past meetings can also be found on the website.

2020 Q4 Update: The TAC held one public meeting on November 11th, 2020. The meeting was open to the public. The agenda and minutes for the meeting have been posted on the PPB website (https://www.portlandoregon.gov/police/61449). Reminder emails with the agenda were mailed prior to the meeting and the date and time were posted on the PPB’s website.

2021 Q1 Update: The TAC held two public meetings this quarter, one on January 13 and the other on March 10, 2021. Both meetings were open to the public. The agenda and minutes for the meetings have been posted on the PPB website (https://www.portlandoregon.gov/police/61449). Reminder emails with the agenda were mailed prior to the meeting and the date and time were posted on the PPB’s website.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Establishment of Drop-off centers

**Task Requirements:** Per DOJ - The United States expects that the local CCOs will establish, by mid-2013, one or more drop-off center(s) for first responders and public walk-in centers for individuals with addictions and/or behavioral health service needs. All such drop-off/walk in centers should focus care plans on appropriate discharge and community based treatment options, including assertive community treatment teams, rather than unnecessary hospitalization.

**Status** Actively in Process

**Action Steps:**
1. PPB representatives will seek participatory roles on local Coordinated Care Organization committees
2. PPB's Compliance team will convene meeting of stakeholders to reinitiate discussions of a secure drop-off center

**Task Date Completed:**  

**Received DOJ Approval?** Approval

**Evidence of Completion:**

2014 Q1 Update: DOJ Compliance team has initiated conversations with the various stakeholders necessary to the creation of such a facility including representatives from the State, county and CCOs

2014 Q2 Update: Compliance team convened the first meeting of state, county and CCO representatives on May 16, 2014 and the second was held on June 13, 2014. The first introduced the issue and identified needs of PPB and others. Discussed old CTC and current use of CATC. Desired data points id'd for next meeting. At the second, Multnomah County provided crisis system overview and the group discussed the data analysis.

2014 Q3 Update: Stakeholders' group continued to meet on a regular basis. The July and August meetings focused on the effects of the current system on the involved parties as well as possible alternatives that are being explored by members of the group including Alameda County, Calif and Bexar County, Texas. Also discussed state hospital flow and waitlist issues.

2014 Q4 Update: The stakeholders' group met in October and November. In October, the members heard an update on the DOJ as well as the State's recent efforts to enhance the crisis respite system. The bulk of the meeting, however, was spent on a report of the local hospitals' efforts to pursue the "Alameda model" for Portland. That included contact with the State re: licensure issues that require OAR revision as well as Medicaid billing code issues; renovation of Holladay Park for this purpose; initiation of conversations with CCOs re: payment; discussions among hospitals to develop a MOU; and need for all the pieces to fit in order for this to become a reality. They reported slow movement in all these arenas while acknowledging the complexity of the issues that are faced when taking on such an endeavor.

The group met again in November and were joined by Mayor Hales who received an extensive updated briefing on the status of the project by Legacy officials. He expressed the City's complete support of this venture.

The members decided to set their next meeting for January to afford more time to make headway on the hurdles currently being addressed by the State and various partners and report back.

2015 Q1 Update: The stakeholders met in January to get the latest word on the progress being made on the various fronts. The State is still working with CCOs on the "rate" to be paid for the PES service. Representatives indicated that should be done by mid-February. The licensing issue appears to be resolved as the PES will be considered a "satellite" of Legacy's hospital.

On February 5th the parties announced that a Letter of Intent had been signed by Adventist, Kaiser, Legacy and OHSU to open the Unity Center for Behavioral Health in late 2016 so the project will now move forward in earnest.

PPB maintained contact with the hospital coalition during the rest of the quarter. The coalition created a number of workgroups for the myriad of topics that need to be addressed in this process. PPB is participating on the Transportation task force charged with creating a system in which EMS replaces PPB as the transporter of those placed on a civil hold and all that entails, including protocols, training, payment, etc. The group held its initial meeting on March 10th and is expected to meet monthly until the Center opens.
2015 Q2 Update: The development of PES is proceeding with dispatch. PPB’s stakeholder meetings have been supplanted by those of the Unity group which is a good and natural progression. PPB continues to actively participate in the Transportation subcommittee which is dealing with the myriad of legal, logistical and systemic issues that arise when determining how to transfer the “hold custody” from law enforcement to EMS or AMR.

2015 Q3 Update: The work required for the creation of the Unity Center continued in earnest. Unity partners have established more than 20 subcommittees to address the vast array of issues that such an endeavor raises from design to discharge. PPB continues to be actively involved in the Transportation workgroup which focuses on all the systemic changes that must be effected to implement this model that takes law enforcement out of the transport business. PPB awaits the formation of an Oregon administrative rules work group to advocate for the necessary rule change to allow EMS/AMR to assume that responsibility. PPB will have a seat on the Unity advisory committee when that is created in 2016.

2015 Q4 Update: The planning and development for the Unity Center continued as scheduled. PPB representatives attended each of the monthly Transportation subcommittee meetings this quarter where the protocols for transfer from police custody to AMR/EMS were discussed. PPB will also participate in the training that is provided to AMR/EMS staff on the changes in policy and procedures that is being developed and will be conducted in March 2016.

2016 Q1 Update: The physical remodel of Holladay Park Hospital is now well underway to convert to the Unity Center. More than twenty subcommittees are working on the various issues that are implicated in creating a PES and a psychiatric inpatient facility at one site. PPB representatives continued to attend the Transportation subcommittee each month of the quarter. The group worked on the protocols for admission to PES to be utilized by AMR; discussed training for the EMTs and AMR staff; and created the questions for the beta test which is scheduled to start in April. PPB also issued a letter of support to the State prior to the rule change hearing for the necessary amendment in Oregon Administrative Rules to allow AMR to transport persons on civil commitment holds instead of PPB.

2016 Q2 Update: The PPB Compliance team continued to attend the monthly Transportation subcommittee meetings as scheduled. This quarter the subcommittee's work centered around developing the protocols for future transport of individuals on holds by AMR or EMTs and creating the questions for the beta test as well as work on the required OAR revisions. Construction on the facility continued in earnest and it is really taking shape. Choices regarding internal design and furnishings are being made and personnel to staff the Center are being hired, including the CMO. The beta testing by AMR was instituted and data collected to get an idea of how many would be brought to Unity based on the medical protocol.

2016 Q3 Update: PPB's Compliance team attended the Transportation subcommittee meetings that were scheduled this quarter. The discussions focused on the mechanics of the hand off of the person in crisis from PPB to AMR. Both entities are exploring technological options for the transmission of the necessary paperwork required for a civil hold. The goal is for PPB to send a copy electronically to AMR who will then forward it to receiving facility rather than rely on paper documents. The construction of the Center is proceeding as scheduled with an opening date of January 5, 2017 for the inpatient side and January 12th for the PES.

2016 Q4 Update: The Transportation subcommittee met only once this quarter in October. The PPB Compliance team attended. Agenda items included update on rule changes to achieve the goal of AMR transport; results of AMR beta testing; report from Communication subgroup on issue of electronic transfer of legal hold documents; future data collection; payment for indigent patients; and the communication plan for the greater community. The AMR is not yet comfortable nor prepared to receive the POH paperwork via secure email so PPB agreed to continue to provide a hard copy for the first quarter of 2017 while the issue continues to be worked out. PPB had already engaged its IT Division in the task of programming but will put that on hold. The group determined that there was no need for a November meeting as the required tasks were completed or underway but agreed to keep the Dec. 22nd meeting date. However, an issue arose with the state OHA regarding the approval of AMR as a secure medical transport, which is a prerequisite for Counties to authorize AMR to transport persons on a hold. A meeting was held in December where the matter was resolved. Meanwhile, AMR continued to train its employees on the new protocol and preparations for the anticipated opening on January 5th for the hospital and January 12th for the PES continued in earnest. Open houses were scheduled in December for partners and the public.
Given all the side meetings and opening activities, the December 22nd meeting was cancelled. PPB also amended its relevant mental health policies (850.21, .22 and .25) to reflect the new protocol of AMR transport. However, PPB awaits the opening day for ambulance transport before enacting the revisions as police will continue to transport until Unity gives the go ahead to AMR.

2017 Q1 Update: The Transportation subcommittee was on a hiatus this quarter as the January and February meetings were cancelled because they were so close to various Unity opening dates. Further delays in the total opening of the PES caused the cancellation of the March meeting as well. However, a smaller group of PPB and AMR folks met with Unity staff on February 24th to discuss the proposal to accept ambulance and police transports initially only between 7am and 7pm as Unity is experiencing a shortage in necessary staffing to cover 24/7. PPB indicated that would not work for the Bureau due to the policy that controls such transports. It does not allow differing rules for transport based on the hour of day. AMR would have to assume responsibility for all transports even if Unity is only an option 12 hours a day.

Unity Center opened in early February but only to walk-ins and transfers from partner hospitals. An executive decision was made to do a stepped approach to the opening to assure it would go smoothly and safely for patients and staff. It was anticipated that it would open for ambulances/police in March but that was postponed due to lack of medical staff. As a result, PPB mental health directives continue to await enactment as they must be timed to the switch in transport responsibility from PPB to AMR.

2017 Q2 Update: The Transportation subcommittee reconvened this quarter. The meetings centered around the hours Unity had the capability to receive police and AMR transports given staffing levels; the hold form to be used; communication methods; transfer issues; etc.

Unity PES opened to ambulances on May 2nd. Due to Unity's collaboration with AMR, Portland Police and others, it was able to safely receive and treat individuals in crisis coming in on Director's Holds, Police Officer Holds and also voluntarily brought by ambulance and police. The Unity PES extended the hours it is open to ambulances and police transports from 7 am to midnight as of May 22 and then to 24/7 on June 1, 2017.

2017 Q3 Update: The Unity Center is fully operational at this time.

PPB's representative is still actively involved with the Transportation subcommittee although it did not meet monthly this quarter as the need has decreased. The system with AMR seems to be operating relatively well with a few exceptions that have been collaboratively addressed by PPB and AMR in separate meetings.

2017 Q4 Update: The Transportation subcommittee met once this quarter on October 19, 2017 and PPB's representative attended.

The new protocol for transport seems to be working well overall. Any issues that arise are dealt with collaboratively with AMR and PPB as they have agreed to meet separately on a quarterly basis to review concerns.

2018 Q1 Update: The Transportation subcommittee met once this quarter in January. The February meeting had to be cancelled. PPB's representative continues to attend and actively participate.

2018 Q2 Update: The Transportation subcommittee met on April 19th and June 21st. The various representatives provided updates from their perspectives. Overall, there are no major issues with the handoff and transport to Unity. AMR and PPB have system in place to immediately deal with any issue that may arise on the street.

PPB's representative continues to attend and actively engage in the discussions.

2018 Q3 Update: The Transportation committee met on July 19th. At the conclusion of the meeting, the committee members decided to formally change its meeting schedule to quarterly so the next meeting was set for October. Thus the subcommittee only met once this quarter.

Topics discussed in July included the admission of those who had been given Geodon and the new AMR contract with the County. Unity then gave its monthly update followed by reports from each partner present.

PPB's representative continues to attend and actively engage in the discussions.

2018 Q4 Update: The Transportation committee held its quarterly meeting on October 25, 2018. The staff of Unity provided an update on the complex process it has been undergoing with CMS and OHA. The Center is currently closed to ambulance admits due to lack of adequate staffing. Priority for admission is given to those patients waiting in emergency rooms who need beds.
Partners then shared their updates—Cascadia reported that their outpatient clinics are unionizing and Project Respond will vote on the issue on Nov. 1st.
PPB noted that there is one additional BHRT now functioning and a fifth expected in December.
AMR indicated that it was recertified as a secure transport so can continue with the protocol established.
No major issues/problems were identified regarding the transfer of custody; AMR did raise the issue of a patient in physical restraints who was recently refused admission. Further info will be gathered and communicated to Unity so the matter can be clarified.

2019 Q1 Update: The Transportation committee held its quarterly meeting on January 24, 2019.
The Chair informed the committee of the pending departure of Chris Farentinos on Feb. 1, 2019. Unity has named an interim director and will initiate a national search for her replacement.
Question regarding whether Unity can refer patients to BHU was raised.
The issue of divert status and the use of HOSCAP system was also discussed. It was reported that diversion is decreasing.
Then the partners gave updates which included information on community paramedic program; the staffing crisis and desperate need for clinicians at Project Respond; the constant struggle with Eds boarding patients who should have gone to Unity initially; and thought being given to Unity having car available for transport for some hours a day.

2019 Q2 Update: The Transportation subcommittee held its quarterly meeting on May 7, 2019.
Much of the meeting revolved around guidelines for AMR; its protocols. A robust discussion ensued regarding patient choice and destination facilities. Also talked about medication protocols.
Finally, the issue of types of mental health holds was raised. This will be a topic of the next meeting.

2019 Q3 Update: The Transportation subcommittee was set to meet on July 25, 2019. Due to a Unity conflict, the meeting was rescheduled to August 29, 2019. However, the PPB representative was on vacation on that date.
Much of the meeting involved determining what transportation data from each partner that the group wants to examine.

2019 Q4 Update: The quarterly Transportation subcommittee meeting scheduled for October 24, 2019 was cancelled. So the next one is scheduled for January.

2020 Q1 Update: The Transportation subcommittee met at Unity Center on January 23rd. Items covered included data on who is transported to Unity as well as updates from the partners and Unity itself.
The next meeting was scheduled for April 23rd.

2020 Q2 Update: The quarterly meeting of the Transportation subcommittee was cancelled due to the COVID 19 situation.

2020 Q3 Update: The Transportation subcommittee met on July 30, 2020. Much of the discussion centered around effect of COVID on the various partners’ operations.
However, one issue raised re: PPB was that of officers dropping voluntary patients off at Unity without reports so issues/circumstances are unclear to staff. Will work with Lt. Hettman and others on reminder about this as officers supposed to leave cell number in case of questions.

2020 Q4 Update: The Transportation subcommittee held its quarterly meeting on October 29, 2020.
A number of issues were discussed by the partners. PPB expressed concern with the possibility of AMR not renewing its certification to do secure transport for PPB’s POHs and discussed efforts PPB is undertaking to satisfy AMR’s needs in order to continue.

2021 Q1 Update: The Transportation subcommittee held its quarterly meeting on February 25, 2021.
Topics addressed included PPB handoffs to AMR as background information about the circumstances surrounding the hold are often not available from AMR personnel. The Burea will ask officers to provide business cards to AMR to give to Unity staff in case there are follow up questions that the treatment provider has about the patient or situation.
AMR related its change in policy re: non-emergency transports due to fiscal concerns.
Project Respond reported being short-staffed and thus hitting capacity more frequently. They are triaging calls and prioritizing as appropriate.
Unity shared that OSH has been unable to accept most civilly committed patients for the last year so long-term care has fallen to

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Unity to provide which detrimentally affects intake and flow. Unity transferred 200 patients in 2019 and only 19 in 2020.

Next meeting scheduled for May 27, 2021.
Creation of Mental Health-Focused Subcommittees

**Task Requirements:** Per DOJ, the Community Care Organizations will immediately create addictions and mental health-focused subcommittee(s), which will include representatives from PPB’s Addictions and Behavioral Health Unit (ABHU), the ABHU Advisory Board, Portland Fire and Rescue, Bureau of Emergency Communications (BOEC) and other City staff. These committees will pursue immediate and long-term improvements to the behavioral health care system.

See Agreement for list of specific required initial improvements, #90.

**Status**  Actively in Process

**Action Steps:** 1. BHU sworn leadership will participate on local Coordinated Care Organization subcommittees.

**Task Date Completed:**

**Received DOJ Approval?** Approval

**Evidence of Completion:**
1. Meeting Notes from Health Share Oregon Meeting (10/18/13)
2. Emails from Deborah Friedman - Behavioral Health Director, Health Share Oregon (10/03/13 and 10/30/13)

**Status Note:**

**2014 Q1 Update:** BHU staff attended various regularly scheduled subcommittee meetings this quarter.

**2014 Q2 Update:** BHU staff attended various regularly scheduled subcommittee meetings this quarter.

**2014 Q3 Update:** BHU staff attended Healthshare’s Substance Use Disorders System of Care Steering committee and PCD’s Public Safety subcommittee meetings.

**2014 Q4 Update:** BHU staff continued to participate in various CCO subcommittees, including the Substance Use Disorders System Care Steering Committee and the Health Commons Learning Collaborative.

**2015 Q1 Update:** BHU personnel continued to represent the Police Bureau on the Health Share Substance Use Disorders System of Care Steering Committee. The purpose of the steering committee is to build consensus for a community-wide vision of a regional system of care for specialty substance use disorder services (i.e., those provided outside the primary care delivery system). The Steering Committee makes recommendations to the Transformation Oversight Committee regarding a service delivery and funding model that will support a fully developed continuum of substance use disorder treatment services in the community.

**2015 Q2 Update:** Service Coordination Team (SCT) Program Manager Emily Rochon was hired in June. She will continue to be a representative on the BHU Advisory Committee.

Health Share of Oregon Community Advisory Council Mental Health and Addictions Sub-Committee's purpose was to empower/engage/represent communities and consumers to inform Health Share's Community Advisory Council of the mental health and addictions needs of Health Share members and ensure those needs are met. The Sub-Committee made recommendations for the Community Health Improvement Plan and has disbanded at this point.

SCT program continues its connections with ED diversion programs within OHSU, Good Samaritan, TriCounty 911, Legacy Emanuel, Family Care Health, Kaiser, and Multnomah County. SCT Program Manager attends the Legacy ED Community Outreach meeting, which includes members of the ED diversion programs. The next Community Outreach meeting is scheduled for 8/5/15.

**2015 Q3 Update:** Service Coordination Team (SCT) Program Manager continues to attend Legacy ED Community Outreach monthly meetings and manages referrals from ED diversion programs, including SCT outreach services for referrals that meet criteria. Legacy ED Community Outreach meeting met twice in Q3. The July 2015 meeting was cancelled due to the holiday.

In attempting to meet DOJ's desire for PPB to engage more with CCOs, SCT Program Manager made an appointment with Michael Anderson-Nathe, Chief Equity & Engagement Officer of Health Share of Oregon. The purpose of the meeting is to determine if Health Share Community Advisory Council would find benefit in having a PPB representative as a council member. The next recruitment cycle and decision on new members will start at the beginning of 2016, with priority focused on utilizers of Health Share/Oregon Health Plan, Clackamas and Washington county, and minority members. PPB is hoping to convince Healthshare
2015 Q4 Update: The SCT Program Manager attended the three monthly Legacy ED Community Outreach meetings this quarter and managed referrals from ED diversion programs for outreach services for those who meet criteria. Health Share of Oregon Community Advisory Council no longer has an established Mental Health and Addictions Subcommittee. The SCT Program Manager met with Health Share of Oregon Chief Equity & Engagement Officer on 10/15/15 to determine if representation from PPB would be considered on the full council. She was informed that new recruitment will start in early 2016, with priority focused on consumers of Health Share/Oregon Health Plan, Clackamas and Washington county, and minority members.

The SCT Program Manager was invited and attended the Advisory Council meeting on 11/6/15. She and the BHU Lieutenant then presented an overview of BHU/SCT at the next Advisory Council on 12/4/15.

Health Share’s Senior Project Manager contacted the SCT Program Manager stating one of its priorities is to recruit consumer applicants who have been in the criminal justice system and have Medicaid. The Health Share rep proposed SCT assist in this effort together since the SCT serves those who may fit that criteria.

The SCT Program Manager met with the Quality Management Coordinator for Behavioral Health at Providence Health and Services. Providence Health and Services has an established Community Partnership Council but membership only includes consumers, patients, clients, and family members. Providence has a newly established Behavioral Health Advisory Council and is in the process of identifying appropriate members, although the recruiting is focused on consumers at this time.

2016 Q1 Update: The Service Coordination Team (SCT) Program Manager continues to attend Legacy ED Community Outreach monthly meetings and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met every month in Q1 although did not provide notes for the meeting in March. Representatives from Family Care and Health Share attend the meeting as well. Because of the wide representation, many providers are able to network and coordinate services for their clients. Becky Wilkinson, Chair, provided a description of the meeting: “The gathering started as a best practices group for outreach, social workers and RNs who started doing community outreach to patients that were frequenting the emergency department more than 5 times in a 6 month period and being admitted to hospitals more than once within a 30 day period, as well as some of the community partners we work with to get our clients access to services outside of the hospital. Over the years, the group as grown exponentially into people from all area hospitals, some out of the area as well (Vancouver, Klamath Falls, etc.), we have clinic folks, homeless shelters, Portland Fire & Rescue, Portland Police social service program, various branches of all tri counties, many community mental health agencies and many more.”

2016 Q2 Update: Service Coordination Team (SCT) Program Manager submitted an “Expression of Interest,” to the Oregon Health Authority State Behavioral Health Collaborative Team. This application was submitted on 6/13/16 and notification of application status is expected in Q3.

“The Behavioral Health Collaborative will chart a course for excellence and sustainability in Oregon’s behavioral health system, with an emphasis on cross-system coordination and collaboration.”

SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met every month in Q2. The group represents staff from all area hospitals, as well as some out of the area (Vancouver, Klamath Falls, etc.), Family Care, Health Share, clinics, homeless shelters, Portland Fire & Rescue, Portland Police, and multiple community mental health agencies. Because of the wide representation, many providers are able to network and coordinate services.

2016 Q3 Update: The Service Coordination Team (SCT) Program Manager's application for the OHA State Behavioral Health Collaborative Team was accepted and she has been attending those meetings twice a month since July 2016. Currently, the SCT Program Manager is involved in the “Scope of Responsibility Workgroup.”

SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met twice in Q3. The group represents staff from all area hospitals, some out of the area as well (Vancouver, Klamath Falls, etc.), Family Care, Health Share, clinics, homeless shelters, Portland Fire & Rescue, Portland Police, various branches of all tri counties, and multiple
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community mental health agencies. Because of the wide representation, many providers are able to network and coordinate services.

2016 Q4 Update: Service Coordination Team (SCT) Program Manager continues to serve as a committee member on the Oregon Health Authority State Behavioral Health Collaborative Team. The committee meets bi-monthly. The committee’s purpose is to, “Produce an achievable Action Plan that defines the policy, financing, and infrastructure needed to modernize and integrate Oregon’s Behavioral Health system with individuals and families at the center of our consciousness and quality client outcomes as our goal.”

SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met once a month in Q4. See previous quarters for detailed description of meeting.

2017 Q1 Update: The Service Coordination Team (SCT) Program Manager continued her service as a committee member representing law enforcement on the Oregon Health Authority State Behavioral Health Collaborative Team. The committee submitted final executive recommendations to the Oregon Health Authority (OHA) this quarter. This group has concluded its work, although OHA may contact specific members after legislative review and vote on recommendations.

SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met once a month in Q1. See previous quarters for detailed description of meeting.

2017 Q2 Update: The Oregon Health Authority (OHA) Behavioral Health Collaborative Team, on which the Service Coordination Team (SCT) Program Manager served as a committee member, concluded its work last quarter. As a result of that effort, OHA will be conducting a forum on, “Transforming Behavioral Health Care in Oregon through IT.” The SCT Program Manager will attend next quarter.

SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met once a month in Q2. During April 2017 Community Outreach meeting, the Behavioral Health Response Teams were asked to present.

Lt. Hager and SCT Program Manager met with representatives from OHA, Multnomah County Mental Health and Addictions, LifeWorks NW, Family Care, Health Share, and Cascadia to, “Identify strategies to improve access and impact vulnerable population.” This was in response to challenges in navigating the mental health system and providing/connecting services to those in mental health crisis in a timely manner. SCT Program Manager continues to follow up with specific service providers to increase access for individuals with whom BHU and SCT are working.

2017 Q3 Update: The Service Coordination Team (SCT) Program Manager attended OHA's forum on “Transforming Behavioral Health Care in Oregon through IT” which was the result of the work of the Collaborative Team on which she served. SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met twice in Quarter 3; the July meeting was cancelled due to the holiday. See previous quarters for detailed description of meeting.

2017 Q4 Update: SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met twice in Quarter 4; November meeting was cancelled due to leadership changes. See previous quarters for detailed description of meeting.

Chief Outlaw, her Lieutenant, and SCT Program Manager were invited to attend a Mental Health Roundtable with Congressman Earl Blumenauer. Congressman and his staff were asking for feedback from various providers and leaders to identify, “challenges to delivering higher quality, more appropriate mental healthcare and services in Oregon.” This was a conversation that was sparked by Oregon being ranked 49th in mental health outcomes.

2018 Q1 Update: SCT Program Manager attended the three monthly Legacy ED Community Outreach meetings that were held this quarter. She managed referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. See previous
SCT Program Manager was asked to present an overview of the Service Coordination Team program at the Legacy ED Community Outreach Meeting. She did so in collaboration with the Central City Concern Supportive Transition and Stabilization Case Manager.

SCT Program Manager will continue discussions with the Administrator of Addictions & Mental Health Division of the Oregon Health Authority about appropriate subcommittees on which to participate.

**2018 Q2 Update:** SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met each month in Quarter 2.

Oregon Health Authority has created work groups to assist in the implementation of the recommendations from the Behavioral Health Collaboration. The SCT Program Manager was a representative on that committee and inquired of OHA's Administrator of Addictions and Mental Health what role she might play in that. She was informed that the subcommittees have started on a small scale and will be expanding to include other stakeholders, including law enforcement.

**2018 Q3 Update:** SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met twice in Quarter 3, due to holiday.

**2018 Q4 Update:** SCT Program Manager continues to attend Legacy ED Community Outreach monthly meeting and manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. Legacy ED Community Outreach met once a month in Quarter 4.

Mike Morris, Oregon Health Authority (OHA) Administrator for Addictions and Mental Health provided an update on the current effort of OHA’s work with CCO’s and the behavioral health system. The overview was covered in the October 2018 BHUAC meeting. See BHUAC meeting notes for details.

**2019 Q1 Update:** SCT Program Manager attended the three Legacy ED Community Outreach monthly meetings that occurred in this quarter. She also managed referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria.

**2019 Q2 Update:** There were three Legacy ED Community Outreach monthly meetings this quarter which the SCT manager attended. She also manages referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria. June minutes have not been distributed to the Community Outreach group by the group facilitator.

**2019 Q3 Update:** There were two Legacy ED Community Outreach monthly meetings this quarter which the SCT manager attended. The July meeting was cancelled due to holiday. SCT Manager also maintains referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria.

**2019 Q4 Update:** The SCT manager attended the Legacy ED Community Outreach group which met twice this quarter. The SCT Manager also maintains referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria.

**2020 Q1 Update:** The SCT manager attended the Legacy ED Community Outreach group which met twice this quarter. The March meeting was cancelled due to COVID-19 restrictions. The facilitator did not distribute the February meeting notes but did provide documents from the presenters. The SCT Manager also maintains referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria.

**2020 Q2 Update:** The SCT manager attended (virtually) the Legacy ED Community Outreach group which met twice this quarter. The April meeting was cancelled due to COVID.

**2020 Q3 Update:** The SCT manager attended (virtually) the Legacy ED Community Outreach group which met twice this quarter. July meeting was
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cancelled due to holiday.

The SCT Manager also maintains referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria.

2020 Q4 Update: The SCT manager continued to attend the virtual Legacy ED Community Outreach group, which met three times this quarter. The SCT Manager also maintains referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria.

2021 Q1 Update: The SCT manager continued to attend the Legacy ED Community Outreach group, which met virtually three (3) times this quarter. The SCT Manager also maintains referrals from ED diversion programs, including SCT outreach services for referrals who meet criteria.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Establishment of Addictions and Behavioral Health Unit (ABHU).

**Task Requirements:** PPB shall develop an Addictions and Behavioral Health Unit (ABHU) within the PPB. PPB shall assign command-level personnel of at least the rank of Lieutenant to manage the ABHU. ABHU shall oversee and coordinate PPB’s Crisis Intervention Team (C-I Team), Mobile Crisis Prevention Team (MCPT), and Service Coordination Team (SCT).

**Status**  Complete - pending external review

**Action Steps:**
1. Assign personnel to new Unit
2. Select and train MCU and ECIT officers
3. Hire additional mental health professionals

**Task Date Completed:** 5/31/2013

**Evidence of Completion:**
1. Personnel Orders and position overviews for personnel assigned to the unit
2. BHU job postings for ECIT officers, MCU officers, BHU Sergeant, and CIT coordinator
3. BHU Org Chart
4. BHU Accomplishments from March, 2013
5. BHU Mission and Goals from May, 2013

**Status Note:**

**2014 Q1 Update:** BHU in place.

**2014 Q2 Update:** No changes in personnel this quarter.

**2014 Q3 Update:** New officer selected and assigned to MCU #1-North Precinct

**2014 Q4 Update:**
During this quarter, BHU decided to refer to the MCPTs as the Behavioral Health Response Teams (BHRTs). Officer Sean Christen, who was part of the BHU’s Behavioral Response Team (BHRT/MCPT), transferred to the Service Coordination Team. Replacing Ofc. Christen on the BHRT is Officer Shaye Samora who met the DOJ-specified criteria.

**2015 Q1 Update:** The BHU team gained an additional Sergeant this quarter. Sgt. Chris Burley joined BHU in February, 2015. The purpose was to expand the Unit's ability to participate in Threat Enhancement activities.

**2015 Q2 Update:** During this quarter, the BHU hired a new SCT program manager, Emily Rochon, to replace Billy Kemmer. The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

**2015 Q3 Update:** During this quarter, the BHU selected a new BHRT Officer, Michael Hansen, to replace Josh Silverman who is returning to Patrol. Officer Hansen started in October 2015. The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

**2015 Q4 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

**2016 Q1 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

**2016 Q2 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

The BHUAC reviewed SOP 3.3 ECIT. The draft changes in this document outline the oversight mechanism for ECIT officers. The BHUAC was also presented with a copy of the Professional Standards SOP. The committee voted to approve the draft SOP 3.3 with additional recommendations. This draft SOP requires a review and signature from the Commander of Central Precinct and will be included in the next quarterly report.

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The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

During the course of the last year, the Behavioral Health Unit Advisory Committee reviewed and made recommendations on the BHU Standard Operating Procedures. These have now been reviewed and signed by the Commander of Central Precinct.

Toward the end of this quarter, Sgt. Todd Tackett joined the BHU to transition into the position that Sgt. Bob McCormick's has held. Sgt. McCormick will be retiring on 10/12/16.

The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

During the course of the last year the Behavioral Health Unit Advisory Committee reviewed and made recommendations on the BHU Standard Operating Procedures. These have now been reviewed and signed by the Commander of Central Precinct.

BHU’s work load capacity was impacted this quarter by the inclement weather, family leave for personnel, and the election followed by the riots.

The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

Lindsey Higginson, a Project Respond clinician, is now working with the BHU full time as a replacement for Averyl Growden. Project Responder continues to provide a rotational clinician and has posted a position for the vacant position.

The BHU continues to consist of a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

However, during this quarter, there were some personnel changes. A new Lieutenant, Chuck Lovell, was named to replace Tashia Hager who was transferred to Detectives. Also, a new BHRT sergeant, Casey Hettman, was assigned to replace Chris Burley, who is now the Bureau's Public Information Officer.

The organizational chart of BHU remains the same with a Lieutenant, two Sergeants, an SCT program manager, an SCT officer, a CIT coordinator, 3 BHRTs, and a Crime Analyst.

However, during this quarter, there were some personnel changes. Lieutenant Chris Wheelwright was named to replace Lt. Chuck Lovell who was transferred to the Chief’s Office. Further, the BHU selected a new BHRT Officer, Chase Bryson, to replace Shaye Samora who was promoted to the rank of Detective and was assigned outside of the unit. Officer Bryson started in October 2017. He met all required criteria. BHRT will be his fulltime assignment and he will be paired with a mental health professional.

During this quarter, the BHU implemented a program to have ECIT-certified officers participate in a temporary rotation within the BHU. ECIT officers will be rotated into the unit for a one-to-two week period. During the time assigned to BHU, the officers will coordinate with current BHRT officers and clinicians to learn more about intersections between policing, the mental health system and other community resources, while working to resolve assigned BHU cases. During this time period, two officers rotated
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through the unit: Officer David Hughes (11/02/17 – 11/15/17) and Officer Jackson Oldham (10/19/17 – 11/01/17). The program has been beneficial and the involved officers have reported gaining information and learning of resources they can take back to their responsibilities as ECIT-certified patrol officers.

2018 Q1 Update: The organizational chart of BHU remains the same this quarter.

However, during this quarter there were some personnel changes within the Unit. CIT coordinator Jason Jones is temporarily attached to Central Precinct as an acting sergeant. BHRT Jim Stegemeyer has been the acting CIT coordinator during Jason Jones’s new assignment. Further, Kyle Hefley, an ECIT trained officer, is temporarily attached to BHU as a BHRT officer, covering for Jim Stegemeyer.

Also, Jamie Williams, a Project Respond clinician, is now working with the BHU full time as the replacement for Dinah Brooks.

The BHU continues to facilitate the ECIT rotation program. During this time period, four officers rotated through the unit: Officer Huntinghouse (01/25/18 – 02/07/18), Officer Tim Ferguson (02/08/18 – 02/21/18), Officer David Baer (02/22/18 – 03/07/18) and Officer Nikolay Hristov (03/08/18 – 03/21/18). The program has continued to be beneficial and the involved officers have reported gaining information and learning of resources they can take back to their responsibilities as ECIT-certified patrol officers.

2018 Q2 Update: There were a number of changes to the organizational chart of BHU this quarter.

Commander Kelli Sheffer retired in June. Commander Mike Krantz has taken her position. Furthermore, PPB added a layer to BHU’s command staff in May by adding Captain Mike Frome to BHU’s chain of command.

Officer Jason Jones is now permanently assigned to Central Precinct as an acting sergeant so Officer Jim Stegemeyer is now the CIT coordinator. In addition, Kyle Hefley, an ECIT trained officer, who was temporarily attached to BHU as a BHRT officer, is now permanently in that position.

The BHU continues to facilitate the ECIT rotation program. However, due to staffing shortages, there were not any officers who rotated thru the BHU this quarter. The BHU is planning on continuing the program as soon as the precincts have the resources. The program has continued to be beneficial as the involved officers have reported an increase in knowledge about resources they can utilize in their roles as ECIT-certified patrol officers.

2018 Q3 Update: BHU again experienced a number of changes in personnel this quarter.

Captain Mike Frome was promoted to Commander of the Transit Division. Lt. Jim Crooker has taken his place as Acting Captain of Central Precinct.

Lt. Wheelwright was transferred to Central Precinct as a patrol Lieutenant. Sergeant Casey Hettman has taken his place as BHU’s Acting Lieutenant.

Officer Billy Kemmer, who was the former program manager of the Service Coordination team and who is also an ECIT trained officer, and Project Respond clinician Sarah Attal, joined the BHU in 2018 Q3, as the fourth BHRT team.

The BHU continues to facilitate the ECIT rotation program. However, due to staffing shortages, no officers rotated through the BHU this quarter. The BHU plans to reinstitute the program as soon as the precincts have the resources as it is beneficial to all involved.

2018 Q4 Update: BHU once again experienced a number of changes in personnel this quarter as moves continue throughout the Bureau.

Sgt. Steve Mirau was assigned as a BHU sergeant, to replace Sgt. Todd Tackett, who is transferring to the Training Division.

Officer Amy Fraser, who is an ECIT trained officer, and Project Respond clinician Elaina Lecher joined the BHU as the fifth
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BHRT team.

The BHU continues to support the idea of the ECIT rotation program. However, due to staffing shortages, no officers rotated through the BHU this quarter. The BHU plans to reinstitute the program as soon as the precincts have the resources as it is beneficial to all involved.

**2019 Q1 Update:** Personnel transitions occurred throughout the Bureau this quarter which, in turn, impacted the BHU roster.

Sgt. Sarah Taylor was assigned as a BHU sergeant.

Due to staffing shortages, no officers rotated through the BHU this quarter. The BHU plans to reinstitute the program as soon as the precincts have the resources as it is beneficial to all involved.

**2019 Q2 Update:** There was one personnel change in BHU this quarter. Sgt. Sarah Taylor was re-assigned to North precinct as a sergeant. Sgt. Benson Weinberger has taken her place.

**2019 Q3 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, a SCT program manager, a SCT officer, a CIT coordinator, 5 BHRTs, and a Crime Analyst.

However, the PPB established a Community Services Division (CSD) in July of 2019. The CSD includes the Behavioral Health Unit (BHU), the Service Coordination Team (SCT), the Office of Community Engagement, and the Bureau’s Homeless liaison.

The CSD reports directly to the Chief of Police and is headed by a Captain, who is Acting Captain Chuck Lovell, who was previously the Lieutenant of the BHU.

**2019 Q4 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, a SCT program manager, a SCT officer, a CIT coordinator, 5 BHRTs, and a Crime Analyst.

The BHU remains within the Community Services Division (CSD) in the Police Bureau’s organizational structure. The CSD continues to be overseen by Acting Captain Chuck Lovell. The CSD reports directly to the Chief of Police which is now Chief Jami Resch.

**2020 Q1 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, a SCT program manager, a SCT officer, a CIT coordinator, 5 BHRTs, and a Crime Analyst.

The BHU added an Admin Specialist II to its staff in this quarter. Brynn Bonssdorf’s duties will include, but are not be limited to, maintaining and updating Mental Health Resource Guide; maintaining and coordinating information for BHU website; coordinating, arranging and confirming meetings; arranging for meeting setup and refreshments; attending meetings, takes notes and transcribing minutes; purchasing supplies; sorting and delivering mail.; creating and maintaining event calendars and coordinating special events; and, with supervision, performing minimal data analysis assignments in accordance with guidance regarding approach and results.

SCT Officer Sean Christian retired from PPB this quarter. Officer Josh Sparks joined the BHU as his replacement.

**2020 Q2 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, a SCT program manager, a SCT officer, a CIT coordinator, 5 BHRTs, a Crime Analyst and an Admin Specialist II.

The BHU remains within the Community Services Division (CSD) in the Police Bureau’s organizational structure. The CSD is now overseen by Captain Jami Resch. The CSD reports directly to the Chief of Police which is now Chuck Lovell, formally Acting Captain of the CSD.

**2020 Q3 Update:** The BHU continues to consist of a Lieutenant, two Sergeants, a SCT program manager, a SCT officer, a CIT coordinator, 5 BHRTs, a Crime Analyst and an Admin Specialist II.

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The BHU remains within the Community Services Division (CSD) in the Police Bureau’s organizational structure. The CSD is now overseen by Captain Tina Jones. The CSD reports directly to the Chief of Police who is now Chuck Lovell, formally Acting Captain of the CSD.

CIT Coordinator Jim Stegemeyer retired during this quarter. He was replaced by BHRT officer Chase Bryson. The BHRT officer replacement position has been selected and a transfer plan is in place for the 4th quarter.

2020 Q4 Update: The BHU remains within the Community Services Division (CSD) in the Police Bureau’s organizational structure. The CSD Captain reports directly to the Chief of Police.

In the fourth quarter, the BHU continued to be allocated a Lieutenant, two Sergeants, a SCT program manager, a SCT officer, a CIT coordinator, five BHRTs, a Crime Analyst and an Admin Specialist II. However, when the retired CIT Coordinator was replaced by BHRT officer Chase Bryson in the third quarter, that BHRT officer position was not filled in Q4. This was primarily due to the significant budget cut PPB suffered and PPB staffing shortages.

Furthermore, it is anticipated that another BHRT officer will be transferred back to patrol duties in February, leaving only the original number of three BHRTs.

2021 Q1 Update: The BHU remains within the Community Services Division (CSD) in the Police Bureau’s organizational structure. The CSD Captain reports directly to the Chief of Police.

In the first quarter, the BHU was allocated a Lieutenant, two Sergeants, a SCT program manager, a SCT officer, a CIT coordinator, three BHRTs, a Crime Analyst and an Admin Specialist II.

2021 Q2 Update:  
2021 Q3 Update:  
2021 Q4 Update:  

2022 Q1 Update:  
2022 Q2 Update:  
2022 Q3 Update:  
2022 Q4 Update:  

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Task Description
ABHU manages data sharing and utilization

Task Requirements:
ABHU will manage the sharing and utilization of data that is subject to lawful disclosure between PPB and Multnomah County, or its successor. PPB will use such data to decrease law enforcement interactions or mitigate the potential uses of force in law enforcement interactions with consumers of mental health services.

Status: Actively in Process

Action Steps:
1. BHU will create a referral tool for PPB officers to refer individuals to BHU caseload
2. Hire BHU analyst to maintain, evaluate, and assess the referral tool
3. BHU Analyst will provide periodic analysis of database
4. BHU will conduct monthly assessments of referrals followed up on by the Mobile Crisis Unit and the resolution of their efforts
5. BHU will analyze Crisis Situation Reports
6. BHU will produce a monthly newsletter and distribute widely
7. BHU will create SOPs outlining the responsibilities of utilizing and sharing information generated from various databases and analyses
8. BHU will provide annual report, which includes analysis of this data

Task Date Completed:

Received DOJ Approval?

Approval

Evidence of Completion:
1. Monthly newsletters
2. Crisis Situation Report analysis
3. Confidential analysis of BHU Electronic Referral System (BERS) and MCU caseload (on request)
4. DRAFT SOP 2-1 for BERS

Status Note:

2014 Q1 Update: BHU conducts bi-monthly meetings with system partners to discuss mutual clients and associated data.

2014 Q2 Update: BHU continues to hold bi-monthly meetings with its system partners to discuss clients of mutual concern as well as associated data.

2014 Q3 Update: BHU held its Coordination Team meetings on a regular basis through the quarter to discuss new referrals and review followup clients. MCU also met regularly to discuss clients' status and their needs.

2014 Q4 Update: The BHU continued to meet every Wednesday to discuss the BHRT caseload during this quarter. These meetings serve as the platform for the BHU Coordination Team (BHUCT) meeting held every other Friday. The BHU facilitated 6 BHUCT meetings.

The BHU Sergeant and CIT Coordinator developed a training plan to participate in the Multnomah County Directors Designee Training to facilitate better interaction between mental health professionals directing civil custody and police transports. The BHU participated in the first class on November 20, 2014.

2015 Q1 Update: BHU staff held its regular weekly Wednesday meeting throughout this quarter to discuss the BHRT caseload. These served as basis for the BHU Coordination Team (BHUCT) meeting held every other Friday with its partners. The BHU facilitated 5 BHUCT meetings in this time period.

2015 Q2 Update: The BHU continued to meet every Wednesday to discuss the BHRT caseload during this quarter. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, held every other Friday. The BHU facilitated 5 BHUCT meetings in this time period.

The SCT continued to meet every Monday to manage referrals through coordination with Central City Concern, Volunteers of America, Department of Community Justice, District Attorneys, Portland Patrol, and Multnomah County Sheriff’s Office. SCT and partner agencies, Central City Concern and Volunteers of America, also met weekly to facilitate continuation of care for current SCT clients.

2015 Q3 Update: During this quarter the BHU continued to meet every Wednesday to discuss the BHRT caseload. These meetings serve as a

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platform for the BHU Coordination Team (BHUCT) meeting, held every other Thursday. The BHU facilitated 5 BHUCT meetings in this time period.

The SCT continued to meet every Monday to manage referrals through coordination with Central City Concern, Department of Community Justice, the District Attorney's office, Portland Patrol, and Multnomah County Sheriff's Office. In addition, SCT and partner agencies, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment) started formally meeting weekly on 10/19/15 to facilitate continuity of care for current SCT clients.

BHU is continuing to look at avenues to share appropriate BERS data with its community partners.

2015 Q4 Update: The BHU met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, held every other Thursday. The BHU facilitated 6 BHUCT meetings in this time period.

The SCT continued to meet every Monday to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol, and Multnomah County Sheriff's Office. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT clients.

The SCT Program Manager and Central City Concern Supportive Transitions and Stabilization program (STS) supervisor (see DOJ#112) have met on several occasions to identify data collection and analytic tools necessary for reporting on performance measures. Data collection will benefit both entities in creating a baseline for outcome measures. The two will continue to meet and modify tools as necessary as the program evolves.

BHU is continuing to look at avenues to share appropriate BERS data with its community partners.

2016 Q1 Update: The BHU met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, held every other Thursday. The BHU facilitated 7 BHUCT meetings in this time period.

BHU has recently started sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every Monday to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol, and Multnomah County Sheriff's Office. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT clients.

SCT Program Manager and Central City Concern Supportive Transitions and Stabilization Program Supervisor (see DOJ#112) have met on several occasions to identify data collection and analysis tools necessary for reporting performance measures. Data collection will benefit both Central City Concern and BHU/SCT in creating a baseline for outcome measures. The two agencies will continue to meet and modify tools as necessary as the program evolves.

2016 Q2 Update: The BHU met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, held every other Thursday. The BHU facilitated 6 BHUCT meetings in this time period.

BHU has continued sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every Monday to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol, and Multnomah County Sheriff's Office. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT clients.

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SCT Program Manager and Central City Concern supervisors and data analyst have continued to meet to update reporting requirements. Data collection will benefit both Central City Concern and BHU/SCT in creating a baseline for outcome measures. The two agencies will continue to meet and modify tools as necessary as the program evolves.

**2016 Q3 Update:** The BHU met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a basis for the BHU Coordination Team (BHUCT) meeting, held every other Thursday. The BHU facilitated 6 BHUCT meetings in this time period.

BHU has continued sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every Monday to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol, and Multnomah County Sheriff’s Office. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT clients.

SCT Program Manager and Central City Concern supervisors and data analyst have continued to meet to update reporting requirements. Data collection will benefit both Central City Concern and BHU/SCT in creating a baseline for outcome measures. The two agencies will continue to meet and modify tools as necessary as the program evolves.

SCT has shared data and outcome measures during the SCT presentation at the Regional CIT Conference, Portland Patrol Inc., and our partner agencies.

**2016 Q4 Update:** The BHU met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, held every other Thursday. The BHU facilitated 6 BHUCT meetings in this time period.

BHU has continued sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every week to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., and Multnomah County Sheriff’s Office. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT clients.

SCT Program Manager and Central City Concern supervisors and data analyst have continued to meet to update reporting requirements. Data collection will benefit both Central City Concern and BHU/SCT in creating a baseline for outcome measures. The two agencies will continue to meet and modify tools as necessary as the program evolves.

**2017 Q1 Update:** The BHU met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, held every other Thursday. The BHU facilitated 6 BHUCT meetings in this time period.

BHU has continued sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every week to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., and Multnomah County Sheriff’s Office. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT clients.

SCT Program Manager and Central City Concern supervisors and data analyst have continued to meet to discuss reporting requirements. Data collection will benefit both Central City Concern and BHU/SCT in creating a baseline for outcome measures.

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The two agencies will continue to meet and modify tools as necessary as the program evolves.

2017 Q2 Update: During the 2nd quarter, the BHU updated its BERS system. This update helped streamline the BERS software, but more importantly the BHU created a system that tracks a referral's status at the point of the Sergeant’s evaluation of the referral. This includes whether a referral was accepted/declined and the reason for the decline. Prior to this change, BERS-related information around these data points existed in a text-based system and the BHU had to manually go through each referral and case notes to get the data. With the new BERS upgrade, PPB can now answer various questions that the COCL has proposed in the past.

The BHU Lieutenant has been meeting on a monthly basis with the Program Manager of Crisis Services for the Multnomah County Health Department. The purpose of these meetings is to develop ways to share data and information. As this effort progressed, there were additional meetings that included a representative from Cascadia as that agency was identified as potentially being impacted by the processes being created. The end result is that BHU will begin to share all referral information with Multnomah County Mental Health on a weekly basis. This process is outlined in the memo “Procedures: Crisis Line” created by the BHU Lieutenant and sent to the BHU staff.

The BHU met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting which is held every other Thursday. The BHU facilitated 7 BHUCT meetings in this quarter. BHU has continued sharing BERS-related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every week to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office. The goal of the meeting is to coordinate services by assessing needs of individuals through data/information sharing. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT clients.

2017 Q3 Update: During this quarter, the BHU began tracking whether any current or former BHU clients had any recent police contact. This procedure is outlined in the memo “Procedures: BERS Client Police Contact” created by the BHU Lt. and distributed to the BHU staff.

The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting which is held every other Thursday. The BHU facilitated 5 BHUCT meetings in this quarter. BHU has continued sharing BERS-related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every week to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office. The goal of the meeting is to coordinate services by assessing needs of individuals through data/information sharing. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT participants.

SCT Program Manager and Central City Concern supervisors and data analyst have continued to meet to discuss reporting requirements. Data collection will benefit both Central City Concern and BHU/SCT in creating a baseline for outcome measures.

2017 Q4 Update: In this quarter, BHRT officers have been preparing fliers with relevant information on some assigned individuals to send to their respective precincts that detail BHU’s efforts to work with some assigned individuals and relevant information for officers that may come into contact with said individuals. The goal of the fliers is to better inform officers of ways to interact with the involved
Also during this quarter, the BHU began querying police reports to analyze if officers have stated that a BERS referral has been made or BHU has been notified, and cross-reference that information with the BHU Electronic Referral System (BERS). This procedure is outlined in the memo “Procedures: BERS Cross-Reference in Gos” was created by the BHU Lt. and distributed to the BHU staff. This procedure hopes to identify gaps in the BHU referral system buy police querying reports to analyze if officers have stated that a “BERS referral” has been made or “BHU has been notified” and cross-references that information with the BHU Electronic Referral System (BERS). If the identified individual has not been referred to the BHU, a BHU Sergeant or BHU staff will then create a referral based on the cross-referenced information.

The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting which is held every other Thursday. The BHU facilitated 4 BHUCT meetings in this quarter. BHU has continued sharing BERS-related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet every week to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office. The goal of the meeting is to coordinate services by assessing needs of individuals through data/information sharing. SCT and its partners, Central City Concern Housing Rapid Response (housing) and Central City Concern Recovery Center (addiction treatment), met weekly to facilitate continuation of care for current SCT participants. SCT Program Manager and Central City Concern supervisors and data analyst have continued to meet to discuss reporting requirements. Data collection will benefit both Central City Concern and BHU/SCT in creating a baseline for outcome measures.

SCT Program Manager has been a participant in the Downtown Public Safety Action Committee (DPSAC) for several years. DPSAC’s goal is to highlight and address public safety issues in the downtown core by collaborating with various partners, including Multnomah County. Current mission statement is: “The Public Safety Action Committee is a place for city residents, businesses, property owners, and local governments to be informed, be heard, and be engaged in finding new ways to ensure livability and public safety.”

**2018 Q1 Update:** BHRT officers continue to prepare fliers with relevant information on some assigned individuals to send to their respective precincts that detail BHU’s efforts to work with some individuals and relevant information for officers that may come into contact with said individuals.

The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, six of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in the these meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office. See previous reports for detailed description of meeting and data collection. SCT Program Manager presented the SCT/STS trend analysis developed by BHU data analyst to the partners at the SCT Coordination meeting.

Following work initiated last quarter, BHU, Portland Business Alliance, Multnomah County, Project Respond and BOEC made
two community presentations to various city business people. It covered tips/techniques of how to assist someone experiencing a mental health issue; signs/symptoms of a mental illness; de-escalation; resources available to the community; who to call in a crisis; followed up by a Q & A.

SCT Program Manager continues to participate in the Downtown Public Safety Action Committee (DPSAC). DPSAC’s goal is to highlight and address public safety issues in the downtown core by collaborating with various partners, including Multnomah County. See previous reports for more detailed description.

2018 Q2 Update: The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a platform for the BHU Coordination Team (BHUCT) meeting, four of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office. See previous reports for detailed description of meeting and data collection. Next quarter, SCT Program Manager plans to present the updated SCT/STS trend analysis developed by BHU data analyst to the partners at the SCT Coordination meeting.

Portland State University conducted the 10th annual Capstone study on the Service Coordination Team this quarter. The final executive report has not yet been submitted to the SCT Program Manager.

2018 Q3 Update: The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a basis for the BHU Coordination Team (BHUCT) meeting, four of which were held this quarter on alternating weeks.

BHU has continued sharing BERS-related data with its partners in these meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office. SCT Program Manager presented the updated SCT/STS trend analysis developed by BHU data analyst to the partners at the SCT Coordination meeting.

The BHU is still providing informational fliers to precincts as needed.

MCCL asked that BHU provide phone numbers on the BERS referrals sent weekly to the MCCL. BHU fulfilled the request.

2018 Q4 Update: The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a basis for the BHU Coordination Team (BHUCT) meeting, five of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office.

The BHU is still providing informational fliers to precincts as needed.

2019 Q1 Update: The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a basis for the BHU Coordination Team (BHUCT) meeting, five of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.
The SCT continued to meet weekly to manage referrals by coordinating with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office.

This quarter, SCT Manager shared SCT-STS 2018 Q4 trend analysis with partner agencies during the coordination team meeting.

The BHU is still providing informational fliers to precincts as needed.

**2019 Q2 Update:** The BHU staff met as usual every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a basis for the BHU Coordination Team (BHUCT) meeting, seven of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center and Multnomah County Sheriff’s Office.

This quarter, SCT Manager shared SCT-STS 2019 Q1 trend analysis during the coordination team meeting with partner agencies.

The BHU is still providing informational fliers to precincts as needed.

**2019 Q3 Update:** The BHU staff met as scheduled every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a basis for the BHU Coordination Team (BHUCT) meeting, five of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., DePaul Treatment Center, Portland Rescue Mission, Urban League, and Multnomah County Sheriff’s Office.

This quarter, the SCT Manager shared SCT-STS 2019 Q2 trend analysis during the coordination team meeting with partner agencies.

The BHU is still providing informational fliers to precincts as needed.

**2019 Q4 Update:** The BHU staff met as scheduled every Wednesday this quarter to discuss the BHRT caseload. These meetings serve as a basis for the BHU Coordination Team (BHUCT) meeting, four of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., Urban League, and Multnomah County Sheriff’s Office.

This quarter, the SCT Manager shared SCT-STS 2019 Q3 trend analysis during the coordination team meeting with partner agencies.

The BHU is still providing informational fliers to precincts as needed.

**2020 Q1 Update:** The BHU staff met as often as possible on Wednesdays this quarter to discuss the BHRT caseload. Due to COVID-19, some of the meetings were initially cancelled or then held remotely. Moving forward, the infrastructure is now in place to ensure the continuity of these meetings on a remote basis. These meetings serve as the groundwork for the BHU Coordination Team (BHUCT) meeting, four of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., Urban League, and Multnomah County Sheriff’s Office.

This quarter, the SCT Manager shared SCT-STS 2019 Q4 trend analysis during the coordination team meeting with partner agencies.

The BHU is still providing informational fliers to precincts as needed.
This quarter, the SCT Manager shared SCT-STS 2019 Q4 trend analysis during the coordination team meeting with partner agencies.

The SCT Manager and BHU Lieutenant presented to Central City Concern’s Health Services Advisory Council (HSAC) regarding overall BHU and SCT programing during Q1.

Critical information regarding COVID-19 impacts on public safety services and responses were shared with key stakeholders via email to both BHU Advisory Committee (BHUAC) and Adult Mental Health and Substance Abuse Advisory Council (AMHSAAC) members.

The BHU is still providing informational fliers to precincts, when appropriate.

**2020 Q2 Update:**
The BHU staff met on a number of Wednesdays this quarter to discuss the BHRT caseload. Due to COVID-19 and staffing (re: protests), some of the meetings were initially cancelled or then held remotely. Moving forward, the infrastructure is now in place to ensure the continuity of these meetings on a remote basis. These meetings serve as the groundwork for the BHU Coordination Team (BHUCT) meeting, four of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet weekly to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., Urban League, and Multnomah County Sheriff’s Office.

The BHU is still providing informational fliers to precincts, when appropriate.

**2020 Q3 Update:**
The BHU staff met every Wednesday this quarter to discuss the BHRT caseload. The structure is now in place to ensure the continuity of these meetings on a remote basis. These meetings serve as the groundwork for the BHU Coordination Team (BHUCT) meeting, four of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet weekly (virtually) to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., Urban League, and Multnomah County Sheriff’s Office.

Regarding some of the trends that BHU is seeing related to referral data, the figures are indicating that in 2020 Q3, the total amount of referrals and outcomes are lower this quarter compared to previous quarters as is the average weekly caseload.

In looking at these trends and still seeking to be a learning organization, some explanations for this data have been explored. First, due to the extreme circumstances over the last months and with severely depleted numbers of officers able to take calls, PPB was/is only responding to the highest of priority calls. A number of priority 3 and 4 calls are waiting so long that either officers are not ending up encountering people by the time they get there, or the calls are being cancelled by patrol sergeants or BOEC. Thus, officers never had a chance to respond to a community member to assess if that person needed to be referred to the BHU.

To further that point, in speaking with members of BOEC, they have stated that they are seeing tremendous wait times for response to calls for service. This is not due to their staffing levels. These wait times reflect PPB’s staffing issues and response times, which then impact how much information and police contacts are getting lost from caller to BOEC because of wait times.

Further, the City is still experiencing an inordinate amount of civil unrest. This displaces staffing. This displacement leads to fewer officers working in a patrol unit thus reducing the chance of making referrals to the BHU. Further, PPB saw a large number of
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retirements in this quarter. These officers have not been replaced due to budget cuts. Once again, fewer officers working patrol results in reducing the likelihood of making referrals to the BHU.

Another interesting point is that PPB is seeing an increased number of police officer and/or director’s holds being placed. This may indicate that officers are resolving the issues on the scene and getting people where they need to go from the beginning, rather than needing to push it to BHU, as the community member is already receiving or engaging in services.

It must be noted that the COVID issue, civil unrest, and wildfires not only affect patrol officers making referrals but the community's role in making a request and seeking a police response.

Concerning fewer outcomes and fewer individuals on BHU’s caseload in the third quarter, this can be explained by fewer referrals equal fewer assignments which equal fewer outcomes. All three of these data points are interconnected. In addition, when examining BHU referrals, the data show that the time on a caseload is slightly less, compared to previous quarters. This may indicate that the BHRT’s are still working through their caseload as they would normally, in spite of all the challenges.

Even though referrals to the BHU are lower than previous quarters, the BHU are still assigning close to 50% (45% for Q3). Furthermore, in trying to use data to drive decisions, the BHU is now searching through CAD calls to see if anyone has mentioned BHU or BHU referral and cross-referencing that information. This is an example, among others that have been enacted in the past, of how the BHU trying to make sure that the unit is not missing referrals.

The BHU is still providing informational fliers to precincts, when appropriate.

2020 Q4 Update: The BHU staff met Wednesdays this quarter to discuss the BHRT caseload. The structure is now in place to ensure the continuity of these meetings on a remote basis. These meetings serve as the groundwork for the BHU Coordination Team (BHUCT) meeting, four of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet virtually on a weekly basis to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., Urban League, and Multnomah County Sheriff’s Office. SCT Program Manager presented and shared the Q3 SCT Trend Analysis Report to the Service Coordination partners.

BHU is still seeing some unique trends related to referral data, regarding the total number of referrals and outcomes that are lower this year compared to previous YTDs as is the average weekly caseload. BHU would assert that the explanations laid out in the previous quarter still hold true and are impacting BHU referrals (re: severely depleted numbers of officers able to take calls; PPB was/is only responding to the highest priority calls; tremendous wait times for response to calls for service).

BHU continues to explore the increased number of police officer and/or director’s holds being placed and the impact on BHU referrals. The Captain of CSD has discussed police officer and/or director’s holds at the Captains and Commanders meetings on various occasions.

Even though referrals to the BHU are lower than previous quarters, the BHU is still assigning close to 50% (49% for Q4) of all referrals. Furthermore, in using data to drive decisions, the BHU is still searching through CAD calls and police reports to see if anyone has mentioned BHU or BHU referral and cross-referencing that information. This is an example, among others that have been enacted in the past, of how the BHU is trying to make sure that the unit is not missing referrals.

The BHU is still providing informational fliers to precincts, when appropriate.

2021 Q1 Update: The BHU staff met Wednesdays this quarter to discuss the BHRT caseload. The structure is now in place to ensure the continuity of these meetings on a remote basis. These meetings serve as the groundwork for the BHU Coordination Team (BHUCT) meeting, Friday, May 7, 2021
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four of which were held this quarter on alternating weeks. BHU has continued sharing BERS-related data with its partners in these meetings.

The SCT continued to meet virtually on a weekly basis to manage referrals through coordination with Central City Concern, Department of Community Justice, District Attorneys, Portland Patrol Inc., Transition Project Inc., Urban League, and Multnomah County Sheriff's Office. SCT Program Manager presented and shared the Q4 SCT Trend Analysis Report to the Service Coordination partners.

BHU is still seeing a lower assigned caseload than previous quarters. This might be due to stabilizing the caseload after the reduction from five BHRTs to three.

BHU continues to explore the increased number of police officer and/or director’s holds being placed and the impact on BHU referrals.

Furthermore, in using data to drive decisions, the BHU is still searching through CAD calls and police reports to see if anyone has mentioned BHU or BHU referral and cross-referencing that information. This is an example, among others that have been enacted in the past, of how the BHU is trying to make sure that the unit is not missing referrals.

The BHU is still providing informational fliers to precincts, when appropriate.
ABHU shall use data to develop response strategies and identify opportunities for improvement

**Task Requirements:** ABHU shall track outcome data generated through the C-I Team, MCPT, and SCT, to: (a) develop new response strategies for repeat calls for service; (b) identify training needs; identify and propose solutions to systemic issues that impede PPB’s ability to provide an appropriate response to a behavioral crisis event; and (c) identify officers’ performance warranting commendation or correction.

**Status**  Actively in Process

**Action Steps:**
1. BHU will meet weekly to discuss caseloads, debrief contacts, and assess best practices
2. BHU will track analysis through meeting notes
3. The BHU sergeant and the CIT Coordinator will review all cases that are referred to the unit and enter, assign, and update each case in the BHU Electronic Referral System (BERS)
4. BHU CIT Coordinator will review the minutes from weekly meetings to pull relevant information for Training Division Needs Assessment development
5. BHU will pursue enhancements to PPB’s data collection on officer interactions with individuals with behavioral health issues

**Task Date Completed:**

**Evidence of Completion:**
1. BHU staff meeting notes, example provided, names redacted
2. Confidential analysis of MCU Active Caseload (upon request)

**Status Note:**

**2014 Q1 Update:** BHU tracked outcome data for SCT, MCU and ECIT during the quarter.
**2014 Q2 Update:** BHU tracked outcome data for SCT, MCU and ECIT for the quarter.
**2014 Q3 Update:** BHU tracked outcome data for SCT, MCU and ECIT for the quarter. It is analyzing various data points to identify systemic issues that need to be addressed.
**2014 Q4 Update:** BHU continued to track outcome data for its three focus areas. It is exploring how to utilize the information in the most effective way.
**2015 Q1 Update:** BHU maintained data on the activities of its three operations.
**2015 Q2 Update:** BHU continued to collect and maintain data on its three arenas of operation. In addition, it developed and began tracking performance measures which will provide outcome data in time. Those, in turn, will be used to identify new response strategies for repeat calls, training needs and possible solutions for systemic issues that hamper its work.
**2015 Q3 Update:** BHU continued to collect and maintain data on its three arenas of operation.
**2015 Q4 Update:** BHU continued to collect and maintain data on its three arenas of operation.
**2016 Q1 Update:** BHU continued to collect and maintain data on its three arenas of operation.
**2016 Q2 Update:** BHU continued to collect and maintain data on its three arenas of operation.
**2016 Q3 Update:** BHU continued to collect and maintain data on its three arenas of operation.

The BHU ceased its collection of ECIT-related data from stand-alone text templates on February 29, 2016. All subsequent ECIT-related data will be gathered from the Portland Police Bureau’s (PPB) Mental Health Mask, which was implemented by PPB’s Strategic Services Division (SSD), during this quarter.

**N.B:** with regard to the STS beds, in this quarter, one bed in a double occupancy room was taken off-line due to systemic barriers. The count utilized for this quarter’s analysis included five beds for 77 days and 6 beds for 15 days. In the future, this count will only use a 6 bed count.

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2016 Q4 Update: BHU continued to collect and maintain data on its three arenas of operation.

2017 Q1 Update: BHU continued to collect and maintain data on its three arenas of operation.

Also, during this quarter, the BHU began to track calls for service at facilities which warrant a mandatory ECIT response. The BHU is exploring additional ways to share appropriate data with its community partners.

2017 Q2 Update: BHU continued to collect and maintain data on its three areas of operation.

The BHU began tracking data on calls for service at PPB identified mental health facilities. The data identifies the number of calls for service along with the deviation from the average on a monthly basis. A protocol was developed to address facilities that may be identified as having an over-reliance on police services. This procedure is outlined in the memo “Procedures: Facilities” created by the BHU Lt. and sent to the BHU staff.

BHU began to share all referral information with Multnomah County Mental Health on a weekly basis. This process is outlined in the memo “Procedures: Crisis Line” created by the BHU Lieutenant and sent to the BHU staff.

2017 Q3 Update: As required, BHU continued to collect and maintain data on its three areas of operation.

During the third quarter, the BHU began tracking if any current or former BHU clients had any recent police contact. This procedure is outlined in the memo “Procedures: BERS Client Police Contact” created by the BHU Lieutenant and shared with the BHU staff.

The BHU continued tracking data on calls for service at PPB identified mental health facilities. The data identifies the number of calls for service along with the deviation from the average on a monthly basis. BHU also continued to share all referral information with Multnomah County Mental Health on a weekly basis. This process is outlined in the memo “Procedures: Crisis Line” created by the BHU Lieutenant and sent to the BHU staff.

2017 Q4 Update: As required, BHU continued to collect and maintain data on its three areas of operation.

During this quarter, the BHU began querying police reports to determine if officers have indicated that a BHU Electronic Referral System (BERS) referral has been made or that BHU has been notified, and cross-referenced that with the information in BERS. This procedure is outlined in the memo “Procedures: BERS Cross-Reference in GOs” created by the BHU Lt. and distributed to the BHU staff. This goal of this effort is to identify gaps in the BHU referral system. If the identified individual has not been referred to BHU, a BHU Sergeant or staff person will create a referral based on the information learned.

BHU has been actively working to develop new response strategies for repeat calls for service. Beginning in late October 2017, BHU reached out to the Portland Fire and Rescue’s CHAT (Community Healthcare Assessment Team). A BHU sergeant met with the CHAT team coordinator and discussed areas ripe for collaboration in working with subjects who are high utilizers of the 911 system. As a result, the Portland Fire CHAT coordinator now attends BHU’s bi-weekly BHU Coordination Team meeting where members work to develop strategies to address those clients with repeated police and fire contacts.

2018 Q1 Update: As required, BHU continued to collect and maintain data on its three areas of operation.

2018 Q2 Update: BHU continued to collect and maintain data on its three areas of operation.

2018 Q3 Update: BHU continued to collect and maintain data on its three areas of operation

2018 Q4 Update: As expected, BHU continued to collect and maintain data on its three areas of operation.

2019 Q1 Update: BHU continued to collect and maintain data on its three areas of operation.

2019 Q2 Update: BHU continued to collect and maintain data on its three areas of operation.

2019 Q3 Update: BHU continued to collect and maintain data on its three areas of operation.

2019 Q4 Update: BHU continued to collect and maintain data on its three areas of operation.

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Task Description

Creation of Addictions and Behavioral Health Unit Advisory Committee

Task Requirements: PPB shall establish an ABHU Advisory Committee. The ABHU Advisory Committee shall include representation from: PPB command leadership, CIT, MHCPU, and SCT; BOEC; civilian leadership of the City government; and shall seek to include representation from: the Multnomah County Sheriff’s Office; Oregon State Department of Health and Human Services; advocacy groups for consumers of mental health services; mental health service providers; coordinated care organizations; and persons with lived experience with mental health services.

Status Complete - pending external review

Action Steps:
1. BHU will invite appropriate representatives to participate on BHU Advisory Committee
2. Advisory Committee will establish charter
3. BHU will ensure agendas and minutes for advisory committee are tracked

Evidence of Completion:
1. Roster of the committee
2. BHUAC agendas
3. Confidential BHUAC meeting minutes (upon request)
4. BHUAC Charter
5. Example meeting presentation from June, 2013

Task Date Completed: 3/27/2013

Received DOJ Approval? Approval

2014 Q1 Update: BHUAC continued to meet regularly during the quarter. It reviewed relevant Directives for comment and advised on upcoming ECIT session to be held in April.

2014 Q2 Update: BHUAC met each month of the quarter. The remaining required representative members were selected to join the Council.

2014 Q3 Update: BHUAC met each month of the quarter. Members reviewed relevant Directives, Unit's SOPs and heard presentations on the various units within BHU including MCU and SCT.

2014 Q4 Update: BHUAC met twice this quarter. There were no changes to the membership roster.

2015 Q1 Update: BHUAC underwent significant membership changes this quarter. Dora Perry replaced Brendan Finn from City Government; Melanie Payne replaced Toni Sexton from BOEC; Deborah Friean took a new position within Health Share of Oregon so stepped down from the committee due to time demands but are working on a replacement.
• Sgt. Chris Burley was added to the roster

2015 Q2 Update: BHUAC again experienced a major change in membership as Cristina Nieves has taken Dora Perry’s place as a representative of City Government; Maggie Bennington-Davis left Cascadia and was hired by Health Share of Oregon but she will continue to sit on the committee as a representative from Health Share of Oregon; Beth Epps, the Chief Clinical Officer for Cascadia, joined the committee to represent providers; and Emily Rochon, the new SCT Program Manager, replaced Billy Kemmer on the committee. Additionally, Annasper decided to step away from the committee to dedicate her time to the new Unity Center. Shannon Pullen and Lt. Tashia Hager are looking for another person with lived experience to replace her.

2015 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met each month of the quarter. There were no changes to the membership roster this quarter.

2015 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met only twice during the fourth quarter due to the holidays. The Commander has not been a member of the BHUAC and has been removed from the member list so that her absence is not seen as an issue.

2016 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. In an effort to further relationships with peer organizations, last summer NorthStar was contacted and asked to inquire if any members were interested in joining the BHUAC. Several expressed interest and the BHU Lieutenant, along with the committee Chair, spoke to each and selected one.
During this quarter the BHU Lieutenant decided to add a position for a peer on the committee in an effort to further connections to the peer community. The Lieutenant sought out a person connected with Mental Health America Oregon. Janie Marsh, Director: EVOLVE Peer Delivered Services, accepted a position on the committee in January.

2016 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. There was only one change in membership during this time period. At the end of the quarter, Joe Hagedorn left the Metropolitan Public Defenders Officer and resigned from the committee. This position is not required by the DOJ agreement but it has been an important voice at the BHUAC meetings. The BHUAC Chair and the BHU Lieutenant are pursuing a replacement.

2016 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. The BHUAC Chair and the BHU Lieutenant are pursuing a replacement for the resignation of the representative from the Metropolitan Public Defenders Office that occurred in 2016 Q2; however, the position is not required by the DOJ agreement.

2016 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter. The BHUAC Chair and the BHU Lieutenant selected a replacement for the representative from the Metropolitan Public Defenders Office that occurred in 2016 Q2. Alex Bassos from the Metropolitan Public Defenders Office will begin attending meetings in January 2017. The roster will be updated to reflect this in 2017 Q1.

2017 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. Alex Bassos from the Metropolitan Public Defenders Office joined the meetings as did Leicia Sainz, Crisis Services Program Manager for Multnomah County Mental Health and Addiction Services. Hiroshi Takeo resigned from the committee. The BHU Lieutenant and the BHUAC chair selected Wyndham McNair as his replacement. He will begin attending in 2017 Q2 and the roster will be updated in that quarter.

2017 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. No change in membership occurred this quarter.

2017 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. No change in membership occurred this quarter. BHU Lt. and BHUAC Chair are currently discussing membership changes as terms of various members are expiring.

2017 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met only twice this quarter due to the holidays. Lt. Chris Wheelwright took the place of Lt. Chuck Lovell as a co-chair for the BHUAC. BHU Lt. and BHUAC Chair are currently discussing membership changes as terms of various members are expiring.

2018 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. No change in membership occurred this quarter. New members representing Health Share of Oregon, Multnomah County Mental Health & Addictions Services, and AMR will join the BHUAC in May 2018.

2018 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. New members representing Health Share of Oregon, Multnomah County Mental Health & Addictions Services, and AMR joined the BHUAC in 2018 Q2.

2018 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. A/Lt. Casey Hettman took the place of Lt. Chris Wheelwright who was transferred from the BHP.

2018 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met only two times during the quarter due to the holidays.

2019 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met twice during the quarter (inclement weather forced the cancellation of the February 2019 meeting). New members representing the Multnomah County Sheriff's Office and the Oregon Health Authority joined the BHUAC in 2019 Q1.

2019 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. Three BHUAC members resigned during this quarter. Christina Nieves (City Commissioner Amanda Fritz' Office), Kathleen Roy (Central City Concern) and Wyndham McNair (Central City Concern) all resigned citing time constraints on their schedules. Efforts are currently underway to identify and impanel replacement members.

2019 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter. The August meeting was cancelled due to scheduling conflicts for numerous committee members and a projected lack of quorum. Kathleen Roy (Central City...
Concern) was able to re-join the Committee after alleviating scheduling conflicts that initially prevented her attendance. Winta Yohannes (Commissioner Eudaly’s Office) joined the Committee as a member.

2019 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter. As routinely occurs, the November and December meetings were combined into one to accommodate the holidays.

Winta Yohannes (Commissioner Eudaly’s Office) resigned from the Committee due to overwhelming and incompatible time demands. Tim Case (AMR) resigned due to a change in employment, as he is no longer employed with AMR. Efforts are currently underway to identify replacement representatives for City government and AMR.

2020 Q1 Update: Due to the COVID-19 pandemic, the BHAUC met only once this quarter. Going forward, the BHU has a plan in place to meet remotely for as long as the pandemic’s precautionary measures of limiting in-person meetings continue.

Robert King (Mayor Wheeler’s Office) joined the BHUAC as a City government representative to fill that vacant seat. Thalia Sady (Metropolitan Public Defender) joined the BHUAC as a representative of the legal defense bar. Kathleen Roy (Central City Concern) resigned due to a change in employment, as she is no longer employed with that agency.

2020 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. COVID-19 pandemic restrictions on in-person gatherings remain in effect. As such, BHUAC meetings continue to be held virtually through a web-based meeting platform. The online space has not diminished the work of the BHUAC or quelled any discussion/action.

Jill Archer, Vice President of Behavioral Health for CareOregon joined the BHUAC. Grant Hartley replaced Thalia Sady as the Metropolitan Public Defender representative.

2020 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter. The August meeting was cancelled due to planned absences of a number of committee members, which would have prevented a quorum. BHUAC meetings continue to be held virtually through a web-based meeting platform. However, the online space has not diminished the work of the BHUAC or quelled any discussion/action.

New representatives for the two vacant positions (Central City Concern and AMR) on the Committee have been identified. Work is actively underway to on-board these individuals during the next quarter.

2020 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter. Per BHUAC Bylaws, due to holidays, the November and December meetings are combined and convened on the first Wednesday of December.

BHUAC meetings continue to be held virtually through a web-based meeting platform. However, the online space has not diminished the work of the BHUAC or quelled any discussion/action.

New representatives for the two vacant positions (Central City Concern and AMR) on the Committee have been identified. Work is actively underway to on-board these individuals during the next quarter.

2021 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter.

BHUAC meetings continue to be held virtually through a web-based meeting platform. However, the online space has not diminished the work of the BHUAC or quelled any discussion/action.

Juliana Wallace, Senior Director of Mental Health and Culturally Specific Services at Central City Concern (CCC), re-joined the BHUAC to represent the vacant CCC seat. Juliana previously represented the Unity Center for Behavioral Health. Melissa Eckstein, President of the Unity Center, now represents that organization on the BHUAC. Donald Meyers, Operations Supervisor with American Medical Response (AMR) is new to the BHUAC and fills the vacant AMR seat. Yesenia Carrillo, a Constituent Relations Specialist in City Commissioner Dan Ryan’s office is new to the BHUAC; filling the City Government seat, previously vacated by Robert King. Frederick Staten, Crisis Manager for Multnomah County Mental Health & Addictions Services fills the seat vacated by Leticia Sainz.
The BHUAC convened its first public-facing community engagement meeting during this quarter. The BHUAC previously developed and finalized a Community Engagement Plan after hearing a great deal of interest from community members regarding the work of the BHUAC. Moving forward, the plan is to convene the public engagement meetings once per quarter. The meeting included an overview of the BHUAC, the work done within it, and the work of the BHU. Messaging and advertising went out through a number of mediums and networks to include: Multnomah County Behavioral Health Advisory Committee, PCCEP Behavioral Health Subcommittee, Portland Police Bureau Website (featured on Home Page), BHUAC website, PPB Twitter account, PPB Facebook account, PPB NextDoor account, Northwest Health Foundation, APANO, Disability Rights Oregon, Muslim Educational Trust. (MET), Portland Police Coalition of Advisory Groups, and the Oregon Peer List Serve.
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Task Description
Role and reporting requirements of the ABHU Advisory Committee

Task Requirements: The ABHU Advisory Committee shall provide guidance to assist the City and PPB in the development and expansion of C-I Team, MCPT, SCT, BOEC Crisis Triage, and utilization of community-based mental health services. The ABHU Advisory Committee shall analyze and recommend appropriate changes to policies, procedures, and training methods regarding police contact with persons who may be mentally ill or experiencing a mental health crisis, with the goal of de-escalating the potential for violent encounters. The ABHU Advisory Committee shall report its recommendations to the ABHU Lieutenant, PPB Compliance Coordinator, COCL (as described in the Agreement), and the BOEC User Board.

Status Actively in Process

Action Steps:
1. BHUAC will provide guidance to assist in the expansion and training of the BHU
2. BHU will provide BHUAC with opportunity to attend ECIT training for exposure to training in action
3. BHU will provide BHUAC with all relevant data and documents related to the unit's makeup, training, BOEC Crisis Triage, and police officer utilization of and relationship with community-based mental health services and organizations.
4. The BHUAC will note any formal recommendations for training improvements for each meeting, if such recommendations do arise.

Evidence of Completion:
1. BHUAC Mission Statement and Agendas (located in folder #94)

Task Date Completed: ☑ Received DOJ Approval? Approval

Status Note:
2014 Q1 Update:
2014 Q2 Update: BHUAC continued to review policies, procedures and training methods of the PPB, including the ECIT training conducted in April, 2014. It did not issue reports on its findings, as yet.

2014 Q3 Update: BHUAC filed monthly reports with the parties designated in the Agreement re: what topics it had covered at the meeting and what, if any, recommendations it had as a result of that review.

2014 Q4 Update: BHUAC met twice during the quarter. It heard a presentation on the Multnomah County Crisis Line and made a site visit to the Bureau of Emergency Communications (BOEC) where 911 calls are received and dispatched to observe that system. Members also reviewed the quarterly timelines and the BHUAC reporting requirements now that the agreement is in effect. It did not make any formal recommendations this quarter.

2015 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met monthly during this quarter. In January, the group officially welcomed Lieutenant Hager as head of the BHU and expressed appreciation to Lieutenant Bacigalupi for his groundbreaking work. They then debriefed the DRO public outreach event held in December and reviewed Directives 850.20 and 850.25. The DRO public outreach event held in December and reviewed Directives 850.20 and 850.25. In February, after approving minutes from 3 previous meetings, they heard a presentation on the proposed CIT Refresher Training scenarios by members of the Training Division. They received updates on the Unit's new hires and then held a lengthy discussion on where the BHU should go from here—what are its priorities for the next 6 months and what are its responsibilities in regard to the DOJ settlement agreement? Finally, in March they were introduced to the new BHU Sergeant; had a followup discussion and vote on the CIT Refresher training and BHU Status Report for DOJ action item #96; and had a long discussion on the action items that specifically relate to the BHUAC.

2015 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met 3 times during this quarter. Topics covered in those meetings included:
- Review of Directives 850.20-.25
- Term limits for BHUAC Members
- Bylaws

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• SCT Presentation
• Discussion on in-service CIT Refresher training topics
• Review of DOJ action items related to BHUAC

Recommendations on some of these items were forwarded to the designated parties in the settlement agreement.

2015 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met 3 times during this quarter. Topics covered in those meetings included:
- Upcoming ECIT Training in November
- Whether BHUAC meetings should be open to the public
- SCT Program criteria for six new mental health beds
- Selection Qualifications for BHRT/ECIT Officers
- Recommendations for 2016 CIT In-Service

Any recommendations resulting from these discussions were forwarded to the designated persons.

2015 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met twice during the fourth quarter. Topics covered in those meetings included:
• Presentation and discussion: Trauma Informed Care Class for Upcoming ECIT Training in November
• Final discussion and planning for members to observe ECIT Training
• Work plan and DOJ Requirements for 2016
• Debrief: Observations of ECIT Training

2016 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. Topics covered in those meetings included:
• BOEC Policies and Procedures
• ECIT training observation feedback and recommendations
• ECIT In-service Training
• BHU’s Standard Operating Procedures

2016 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter.
Topics covered in those meetings included:
• Review of BHU’s Standard Operating Procedures
• Discussion with Training Division on ECIT class

2016 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter.
Topics covered in those meetings included:
• BOEC Training Presentation
• Review SOP 3.1 SCT
• Presentation/Discussion on Oregon Performance Plan
• Presentation on Directive 850.20 Mental Health Response and In-Service Training
• BHU Data Discussion

2016 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter.
Topics covered in those meetings included:
• Update on committee recommendations regarding 850.20 Police Response to Mental Health Crisis
• Update on committee discussion regarding cultural diversity in ECIT scenario training
• Presentation and discussion on recommendations regarding BHU outreach efforts
• Discussion on BHU mission statement
• Discussion on committee workplan for 2017, including review of the DOJ report card

2017 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met each month during this quarter. Topics covered in those meetings included:
• Intersection of Law Enforcement and the Community Mental Health System / Juvenile Mental Health Presentation and Discussion
• PPB Training Division Update
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- Intersection of Law Enforcement and the Community Mental Health System: Supportive Transitions and Stabilization (STS) Program
- Discussion of Bylaws
- Intersection of Law Enforcement and the Community Mental Health System: Multnomah County Mental Health and Addiction Services Presentation and Discussion

2017 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met each month during this quarter. Topics covered in those meetings included:

- Intersection of Law Enforcement and the Community Mental Health System / Juvenile Mental Health Presentation and Discussion: Service Providers
- Data Update
- BOEC Update
- Intersection of Law Enforcement and the Community Mental Health System / Juvenile Mental Health Presentation and Discussion: A Home for Everyone

2017 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met each month during this quarter. Topics covered in those meetings included:

- Q&A with the DOJ
- BOEC Training & Crisis Triage
- Presentation on the Unity Center
- Training Division update training scenario
- An Introduction to Multnomah County Sheriff's Mental Health Diversion Plan
- A presentation on what a peer support specialist does

2017 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) held two meetings during this quarter. Topics covered in those meetings included:

- Enhanced Crisis Intervention Team (ECIT) Officer Q & A
- Unity Presentation Follow-Up
- Discussion on 850.22 & 850.25 policies

2018 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met each month during this quarter. Topics covered in those meetings included:

- Intersection of Law Enforcement and the Community Mental Health System: Multnomah Intensive Transition Teams
- Discussion and Vote on Annual In-Service Training for 2018
- BHU’s De-escalation/Livability Presentation for Businesses
- Expansion of the ECIT Dispatch Protocol
- Annual Report
- Planning for 2018

2018 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met each month during this quarter. Topics covered in those meetings included:

- BHU’s De-escalation/Livability Presentation for Businesses
- Status Report April 2018
- BHUAC Member Terms
- Presentation by Tim Case AMR regarding transport of persons with mental illness
- Review and discussion on BHU SOPs #1-1 and #1-2
- Presentation by County Commissioner Sharon Meieran regarding a preview of the forthcoming Mental Health Report
- Upcoming ECIT Training Course

2018 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met each month during this quarter. Topics covered in those meetings
### 2018 Q4 Update:
The Behavioral Health Unit Advisory Committee (BHUAC) met twice during this quarter. Topics covered in those meetings included:
- An update on the State of Oregon’s mental health system
- Discussion on BHU SOP 3.1, 3.2 and 3.3
- A presentation on BHU related data

### 2019 Q1 Update:
The Behavioral Health Unit Advisory Committee (BHUAC) met twice during the quarter. Topics covered in those meetings included:
- PPB Equity & Diversity Plan Presentation
- Justice Reinvestment Project Steering Committee Update
- Review of BHU SOP 3-1
- Mental Health Alliance Presentation

### 2019 Q2 Update:
The Behavioral Health Unit Advisory Committee (BHUAC) met twice during the quarter. Topics covered in those meetings included:
- Presentation on CAHOOTS
- BHU/SCT Budget Update
- Open Meetings Discussion
- Community Engagement opportunities
- BHU Data
- Presentation on BHU’s In-service training module

### 2019 Q3 Update:
The Behavioral Health Unit Advisory Committee (BHUAC) met twice during the quarter. Topics covered in those meetings included:
- Presentation on the proposed Mult. Co. Behavioral Health Resource Center
- Presentation on Mult. Co. Sheriff’s Dept. Jail Navigator & Peer
- BHU Restructuring
- PPB Equity and Diversity Plan
- Mental Health Alliance open meetings request-BHUAC formal response
- Ideas for the BHUAC-increased community engagement
- Presentation by PPB’s Community Homeless Liaison
- Presentation on Information and Q&A-2020 Drug Treatment & Recovery Act

### 2019 Q4 Update:
The Behavioral Health Unit Advisory Committee (BHUAC) met twice during the quarter. Topics covered in those meetings included:
- BHU/BHRT Updates
- Presentation on ECIT Training Course (November 5-8, 2019)
- Development of plan for BHUAC increased community engagement
- Portland Street Response Pilot Program Update
- BHRT/ECIT Case Study / Case Presentations

### 2020 Q1 Update:
Due to the COVID-19 pandemic, the BHUAC met only once this quarter. Going forward, the BHU has a plan in place to meet remotely for as long as the pandemic’s precautionary measures of limiting in-person meetings continue.
At the meeting on January 22, topics covered included:
- PPB Changes/New PPB Chief
- BHRT/ECIT Case Presentation
- Presentation: Leneice Rice, Community Engagement Specialist Multnomah County Local Public Safety Coordinating Council
- Discussion: Draft BHUAC Community Engagement Plan—next steps and finalizing presentation dates (PCCEP and AMHSACC)
- BHUAC goals for 2020 and topics of interest and areas of training

2020 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter.
Topics covered in those meetings included:
- DOJ Status Update
- BHU Data Report
- Finalized BHUAC Community Engagement Plan
- BHUAC goals for 2020 and topics of interest and areas of training
- COVID19 Updates
- PCCEP Update
- 2020 ECIT Training (Update and Feedback)
- Finalized BHUAC Community Engagement Plan
- BHUAC goals for remainder of 2020 and topics of interest and areas of training
- Prepare/plan to review BHUAC Bylaws

2020 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter.
Topics covered in those meetings included:
- Review BHUAC Bylaws
- SOP Reviews
- Discussion: Current National/Local events
- Presentation – The Coalition of PPB Advisory Councils

2020 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter.
Topics covered in those meetings included:
- Presentation on the Threat Assessment Referral Program
- Review and update BHUAC Bylaws (last updated 2017)
- SOP Review (Threat Assessment Referral Program)
- Updates on PPB and BHU staffing
- Updates on SCT program
- Discussion of Coalition of Advisory Groups
- The Year in Review and the Year Ahead

2021 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter.
Topics covered in those meetings included:
- SCT/Housing Rapid Response Program
- BHUAC Community Engagement Plan—Schedule quarterly public meetings dates for the year
- Coalition of Advisory Groups
- SOPs #1-1, 1-2, 1-3 and 1-4
- BHUAC Bylaws
- BHUAC Community Engagement Meeting-agenda and PPT presentation

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

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2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

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Task Description: The Addictions and Behavioral Health Unit Advisory Committee will provide status reports on the implementation of the ABHU and BOEC Crisis Triage, and identify recommendations for improvement, if necessary. PPB will utilize the ABHU Advisory Committee’s recommendations in determining appropriate changes to systems, policies, and staffing.

Status: Actively in Process

Action Steps:
1. BHU analyst will work with BHUAC to draft outline of first BHU Annual Report
2. BHU will work with BHUAC to identify areas of success and opportunities for improvement
3. The BHU will meet with both internal and external stakeholders to discuss what is to be included in the Annual Report
4. BHU Advisory Committee will prepare an Annual Report

Task Date Completed: Received DOJ Approval? Approval

Evidence of Completion:

Status Note:

2014 Q1 Update: BHUAC provided feedback and created report on its recommendations re: ECI training to be considered by BHU and Training in its development of curriculum for April 2014 training. Also finalized annual report summarizing its 2013 activities.

2014 Q2 Update: BHUAC submitted its comments on the proposed mental health Directives 850.20 and 850.25. It began its review of the 2014 ECIT program as well as some of the BHU’s SOPs.

2014 Q3 Update: BHUAC documented its review and recommendations on the Unit’s SOPs that were presented by staff. It filed its reports on those actions with the designated parties for consideration.

2014 Q4 Update: The BHU did not make any formal recommendations this quarter.

2015 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met 3 times during this quarter but did not make any formal recommendations.

2015 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met 3 times during the second quarter. The BHUAC made the following formal recommendations:
- BHUAC supports the expansion of the Service Coordination Team’s available resources to include six mental health beds and an increase in the array of outpatient services offered by the program.
- BHUAC further recommends to the Service Coordination Team that there be a preference to involve peers (people with lived mental health experience) in direct services, planning and management with an emphasis on training peers for management levels.
- BHUAC reviewed Mental Health directive 850.20 et seq and made formal recommendations on the wording and content (see supporting documents). The BHUAC also submitted the status report that was required within 240 days of the signing of the agreement which is also included in the supporting documents.

2015 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met 3 times during the third quarter. The BHUAC made the following formal recommendations:
• Suggested CIT topics for the Annual In-Service training of which the top three topics included Juvenile Mental Health and the Juvenile System, a Peer Panel, and new/update Policies related to BHU Unit and ECIT Program. The committee understands BHU will forward these topics to the Portland Police Bureau Training Division.
• to post the BHUAC agenda on the PPB/BHU website prior to the upcoming monthly meeting.
• to post committee-approved Minutes on the PPB/BHU website starting with the August 2015 minutes so that the previous ones would not have to be redacted.
• to post all previous and future reports to the PPB/BHU website.
• to have Beth Epps represent the BHUAC at the COAB’s mental health subcommittee meetings.
• to approve the selection criteria as presented by the BHU for the use of the six new mental health beds as part of the expansion of
the SCT program with an understanding that clarification on the sex offender language would be provided at a later date.

- to approve the qualifications for the ECIT job posting as presented by the BHU with the following amendments:
  - add the word “minimum” in front of qualification to apply
  - include “Demonstrate emotional self-management skills” as a prerequisite
  - include “Demonstrate de-escalation skills” as a prerequisite
  - include the statement “There will be an extensive work history review with input from command staff (which will include an Internal Affairs & Employee Information System Review).”

September’s recommendations will be included in the next quarterly report.

2015 Q4 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met twice during the fourth quarter. The BHUAC made the following formal recommendations:

- that certain topics be covered in the Trauma Informed Care class of the upcoming ECIT Training including highlighting the link between the ACE Study and adult behavior and make connection between the ACE Study and police work; highlight hypervigilance issues; discuss universal triggers; add a resiliency survey and a personal reflection component that is strength-based.

2016 Q1 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three during the first quarter. The BHUAC made the following formal recommendations:

- The BHUAC committee voted to accept BOEC’s procedure on processing calls involving suicidal threats, attempted suicide and suspected or actual deaths (PO – Suicide RG – 01202016) with the addition of “any of the following” to dispatcher note #2:
  - “Dispatch an ECIT officer, if available, when a call involves a mental health crisis and any of the following:”

- The BHUAC accepts the BOEC ECIT dispatch protocol presented with the following recommended changes:
  - The BHUAC committee voted to recommend BOEC change “Thought Disorders” to “Thought or Perceptual Disorder” and change “Catastrophic Events” to “Traumatic Life Events” in PO – Mental Health and ECIT Dispatch Protocol Resource Guide – 02122016.
  - The BHUAC committee also voted to recommend BOEC add “and then” to #1 in the Dispatcher section of the Resource Guide to ensure that ECIT officers are sent in addition to the district patrol officers.

2016 Q2 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. The BHUAC made the following formal recommendations:

- The BHUAC vote to accept the proposed curriculum of the 2016 ECIT In-service class. (March 2016)
- The BHUAC vote to accept the proposed changes to SOP 3.3 with the following additional changes:
  - In section #2 changing “Communicate with ECIT officers Lieutenant” to “Communicate with the Lieutenant of the ECIT officer”.
  - In section #2 changing “Any decision to remove an ECIT officer from the team will be coordinated by the Central Precinct Commander” to “Coordinate any decision to remove an ECIT officer from the team with the Central Precinct Commander.
- The BHUAC reviewed and approved Standard Operating Procedure #3-2 with the following recommendations:
  - Under #2, add the word “minimum” to read “Officers must meet the following minimum qualifications to apply for the position:”
  - Also under #2, add “Strong collaborative skills” to list of minimum qualifications
  - Change all references of “Project Respond clinicians” to “clinicians” throughout document
  - Change all references of “client” or “consumer” to “individual” throughout document
  - Change all references of “social service resources” to “community resources” throughout document
  - Under #3, Remove the 3rd sentence and bullet points and replace with the following: “Portland Police Bureau has a strong commitment to ensuring BHRT officers and clinicians attend the following training based on availability and funding:
    - Applied Suicide Intervention Skills Training (ASIST)
    - Trauma Informed Care
    - Civil Commitment Investigator Training
    - HIPAA and Law Enforcement Threat Assessment”
  - Under #6 (3rd bullet change “Connect to community mental health services” to “Connect to appropriate community services”
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-Under #7 (1st sentence of 2nd paragraph) change “mental health services” to “community services”
-Under #8 MCU Officer responsibilities and #9 MCU Clinician responsibilities, add the following bullet: “Assist in engaging the individual.”
-Change the order by moving the entire paragraphs #10 and #11 to follow #7 and come before #8
-Under #13 (1st sentence) change “are mentally ill.” to “have actual or perceived mental illness.”
-Under #14 (3rd bullet) change “a person with mental illness.” to “an individual with actual or perceived mental illness.”

•The BHUAC voted and approved the ECIT training as it stands with the following recommendations:
  1) The content of the Trauma Informed Care should be tied into the learning objectives of the Family Panel and be scheduled (when possible) prior to the Family Panel.
  2) N persons should be allowed to observe the ECIT Training unless there is a significant change made to classes or content or a new BHUAC member comes on board.
  3) Invite ECIT officers to the committee to share feedback and experience on the ground using skills learned during training
  4) New classes or material that may be added to future ECIT Trainings could be “taught” or presented to the committee as was previously done with the Trauma Informed Care class.

•The BHUAC recommended the BHU develop a special opportunity at the Training Facility for members of the community to observe the content and instructors of the ECIT Training as if they were officers, in order to build trust with the community and demystify what happens in training.

•The BHUAC reviewed and approved Standard Operating Procedure (SOP) #1-4 for the BHU Crime Analyst position with the following recommendation:
  1) Add “and protected” to the Policy to read: The Behavioral Health Unit (BHU) has the responsibility to ensure statistical data is reliable, valid and protected.”

2016 Q3 Update: The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. The BHUAC made the following formal recommendations:

• to accept the course material and outline presented on BOEC training.
• to recommend that eight (8) hours of training for BOEC dispatchers is not sufficient and that there should be a minimum of eight (8) additional hours.
• to accept the proposed changes to SOP #3.1 with the following additional changes:
  -Throughout SOP #3-1 change “chronic offenders,” to, “individuals who are chronically arrested.”
  -In the Procedure section #2: replace, “…can be traced to addiction from the following referral sources,” to read, “…is related to substance use disorders. The individuals are referred from the following sources:”
  -In the Procedure section #2a and #2b: Combine #2a and #2b or provide a list instead of separate sections.
• to accept the proposed changes to SOP #1-3 with the following additional changes:
  -In the Policy section, first sentence; remove “or drug or alcohol abuse” after “mental illness” to read “The Crisis Intervention Team (CIT) Coordinator will have a primary role in the Portland Police Bureau’s response to individuals who are experiencing behavioral crises that may result from mental illness.”
  -In the Procedure section #1, first sentence; replace “mission” with “role”, “citizen” with “persons”, and “suspected” with “perceived” to read: “The role of the CIT Coordinator is to develop training and resources in support of the Enhanced Crisis Intervention Team to identify and assist persons having frequent contact with police due to known or perceived mental illness.”
  -In the Procedure section #2 change the first sentence to read, “The position of CIT Coordinator will be filled by an officer…”
• to accept the proposed changes to SOP #2.1 with the following additional changes:
  -In the Purpose section, first sentence; add “and the referral process” to the end of the sentence to read: “To define the BHU Electronic Referral System (BERS), the nature of the information it contains, and protection and dissemination of the information, and the referral process.”
  -In the Purpose section, remove the second sentence “The BHU assists people with mental illness or people in crisis.”
  -In the Procedure section 1A Referral Information Management # 1; replace “suspected” with “perceived” to read “Only referrals that contain information indicating an individual has a known or perceived mental illness will be accepted.”

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- In the Procedure section 7C Civil Commitment; replace the current language with “The person was civilly committed or accepted a 14-day diversion as a result of a notice of mental illness.”

- In the Procedure section 8 remove the first sentence that begins “Due to limited resources....” so that the section starts with the sentence “The following are reasons the BHU.....”

- to accept the proposed changes to SOP 1.2 with the following additional changes:

- In the Policy section, replace “mission” with “purpose”, “suspected” with “perceived” and “or drug and alcohol addiction” with “and/or substance abuse” to read: “The purpose of the Behavioral Health Unit (BHU) is to coordinate the response of law enforcement and the behavioral health system to aid people in behavioral crisis resulting from known or perceived mental illness and/or substance abuse.”

- In the Procedure section #2 replace the current language with “The BHU will have a designated Central Precinct Captain (or Commander), Lieutenant, Sergeant and Service Coordination Team Program Manager, who will coordinate with the Training Division, Precinct Command, mental health system providers and community partners.”

**2016 Q4 Update:** The Behavioral Health Unit Advisory Committee (BHUAC) met two times during the quarter. The BHUAC made the following formal recommendations:

The BHUAC recommends that when PPB trains officers about Directive 850.20, the following is highlighted:

- Under About Mental Health Section 1: Mental health is important (as opposed to indispensable) to personal well-being, family and interpersonal relationships, and contribution to community or society. Many people live with mental health issues AND are successful in life, have positive and health relationships, and contribute to community or society.

- Under About Mental Health Section 4: Mental illness is distinct from intellectual or developmental disabilities but they may be co-occurring.

**2017 Q1 Update:** The Behavioral Health Unit Advisory Committee (BHUAC) met three times during the quarter. The BHUAC made the following decisions with regard to its annual workplan:

The BHUAC approved the following top five topics (listed from the most votes to the least) as the priority list for BHUAC to work on in 2017:

1) Intersection of Law Enforcement and the Community Mental Health System/Juvenile Mental Health
2) Unity: transport/police officer hold, how Unity fits into the larger mental health system, Providence/ER’s
3) Effectiveness of the Memphis Model
4) BOEC: direct dispatch to community mental health providers, dispatch protocols-achieve more fully developed crisis triage, overall update on protocols implemented to date, direct dispatch of BHU
5) Disengagement Policy

In addition, of the four items that did not receive any votes, the BHUAC made the following recommendations:

- Modify SOPs (ECIT/BHRT)-removal critera: The BHUAC will not take up further review of Action Item #101 and #108 because the committee has reviewed these items and made recommendations to the related SOPs previously.

- Mission Statement: The BHUAC will not review the BHU Mission Statement in 2017 unless, based on further conversations in 2017, it needs to revisit it. The BHU Mission Statement meets the need of the BHU at this time.

- Mental Health Policy(ies) 850.20, 850.21, 850.22, 850.2: The BHUAC would like a review of Directives 850.20, 850.21, 850.22, & 850.25 to remain on the list of priorities for 2017, as time allows.

- ECIT Officer Panel Presentation: The BHUAC would like an ECIT Officer panel presentation to remain on the list of priorities for 2017, as time allows.

**2017 Q2 Update:** The following are recommendations from the BHUAC during 2017 Q2:

BHUC Bylaws

The BHUAC voted to approve the following changes (in bold and underlined) to the BHUAC Bylaws:

- Article 3: The Behavioral Health Unit Advisory Committee membership is established and maintained solely by the Portland Police Bureau with input from the BHUAC Chair and shall include representation from...
Article 4:
Committee members shall serve for two years and may be appointed for an additional two-year term. It shall be the responsibility of the Behavioral Health Unit leadership with input from the BHUAC Chair to select a replacement member.

Article 5:
The Chair term shall last two years and may be appointed for an additional two-year term.

Article 6:
A simple majority of the BHUAC’s voting membership shall constitute a quorum.

Article 7:
The BHUAC Chair will submit a monthly report including any recommendations made by the BHUAC. The BHU Lieutenant will forward the monthly report to the appropriate parties as described in the Settlement Agreement and respond to the committee in writing regarding each recommendation.

2017 Q3 Update: The BHUAC did not make any formal recommendations as a result of its meetings in June and July. As of the end of the quarter, the BHUAC chair is still crafting the recommendations for August.

2017 Q4 Update: The following are recommendations from the BHUAC during 2017 Q4:

• Regarding PPB Directive 850.22 Police Response to Mental Health Director's Holds and Elopement:
  - BHUAC recommends clarifying the definition of director so that it correctly identifies the person who can write a director's hold. Using Multnomah County's definition of "Director" and "Director's Designee" would provide sufficient clarity.
  -- Under Policy Item 3, BHUAC recommends changing "manage custody" to "manage a person in custody"

• PPB Directive 850.25 Police Response to Mental Health Facilities:
  -- BHUAC recommends greater consistency and clarity throughout the directive in the terms used to describe mental health facilities. There seems to be a distinction at various points in the directive between facilities that are secure/non-secure, designated/non-designated, adult/non-adult and residential/non-residential. The suggestion is that there be independent definitions for facilities that are "secure", "designated", "adult" and "residential".
  -- Further, it appears that despite the application of the directive's policy section to all mental health facilities, there is no guidance for officers where the facility is non-designated or non-adult or non-residential. Therefore, BHUAC recommends procedures be added that describe police response to other mental health facilities referenced in the directive, including mental health facilities that are not designated residential sites, and also mental health facilities that serve people under the age of 18.

BHUs and PPB's responses to these recommendations will be forthcoming.

2018 Q1 Update: The following are recommendations from the BHUAC during 2018 Q1:

Regarding BHU SOP 3-3
- When the BHU SOP is up for review, the BHUAC would like to add the following recommendation: “Any sustained force complaint is strong reason against acceptance into the ECIT program.”

Regarding the Bureau's Annual In-Service Training for 2018
- The BHUAC approved the proposed Annual In-Service Training for 2018 as presented at this meeting.

2018 Q2 Update: The following are RECOMMENDATIONS from the BHUAC during this quarter:

• That the Portland Police Bureau develops a strategic plan in conjunction with feedback from ECIT officers and the community that:
  - improves ECIT officer recruitment and retention
  - increases ECIT officer availability and promotes community engagement-i.e. having ECIT officers available precinct wide and not assigned to a particular district.
• RESPONSE: The BHU received feedback from several ECIT officers during this year’s ECIT refresher training. Some ECIT members expressed concerns over the time they spend on ECIT calls outside of their assigned district or precinct. Several ECIT members also said they thought ECIT officers were being dispatched to calls not requiring an ECIT officer and well within the capabilities of all patrol officers.

• The BHU will continue assessing ECIT officer feedback, share the feedback with command, and support ECIT officers in ways that improve ECIT officer recruitment and retention, increases ECIT officer availability, and promotes community engagement.

• Sergeant Hettman and Officer Stegemeyer will update the BHUAC at the September, 2018 meeting.

• The BHUAC supports BHU’s continued collaboration and development with its community partners of its livelihood & de-escalation presentation.

2018 Q3 Update: The following are recommendations from the BHUAC during this quarter:
• Approval of SOPs #1-1 and #1-2 as written.

2018 Q4 Update: The following are recommendations from the BHUAC during this quarter:
• to accept the SOPs #1-3 and #2-1 as written and SOP #1-4 with wording changes.

SOP #1-4 Section: Purpose (as written)

The BHU Crime Analyst is responsible for development, management, and reporting statistical data of police interactions with persons in behavioral health crisis related to mental health and/or substance abuse.

Purpose should read “…with persons in behavioral crisis that may be related to mental illness and/or substance use”.

RESPONSE: The BHU concurs with the recommendation from the BHUAC on changes to SOP #1-4 and will apply the change to the final version.

2019 Q1 Update: The following are recommendations from the BHUAC during this quarter:
• to accept SOPs #3-2 and #3-3 as written.

2019 Q2 Update: The following are recommendations from the BHUAC during this quarter:
• to approve SOP #3-1 with edits.
SOP #3-1 Section: Procedure and Responsibility #3. Additional paragraph as follows:
“In collaboration with BHU, SCT offers a direct, service-connected housing for individuals assigned to the Behavioral Health Response Team (BHRT). The goal is to decrease police contact by assertively addressing the needs of individuals with mental health and co-occurring disorders.” (Motioned in March)

2019 Q3 Update: The following are recommendations from the BHUAC during this quarter:
• The committee recommended to draft a letter in response to the Mental Health Alliance’s (MHA) request for open to the public BHUAC meetings.

2019 Q4 Update: The following are recommendations from the BHUAC during this quarter:
• The committee agreed to submit a draft of community engagement ideas to the Mental Health Alliance by the end of the year (December 31, 2019).

2020 Q1 Update: There were no formal recommendations brought forward by the BHUAC in the first quarter.

2020 Q2 Update: The following are recommendations from the BHUAC during this quarter:
• The committee voted to approve the BHUAC Community Engagement Plan.

2020 Q3 Update: Formal recommendations were only made during the September meeting and related to two new BHU SOPs. These recommendations will be included in the 2020 Q4 report, once the report and BHU response are approved.

2020 Q4 Update: There were no formal recommendations brought forward by the BHUAC during the fourth quarter.
It was mentioned in the third quarter report that formal recommendations proposed during that quarter, would be documented in this quarter’s report due to the approval timeline. The recommendations were as follows:

The committee recommends to accept SOP #1-6 as written, and SOP #1-5 with the following edits:

SOP #1-5 Sections:
2. Add “(i.e. sustained use of force complaint).”
5a. Replace “citizens” with, “community members.”
5b. Replace “Citizen groups” to “community groups.”
5d. Replace “Occasional meetings” to “occasional meetings/events outside of regular work hours.”
10. Spell out TARP as Threat Assessment Referral Program
14. Omit the word “Threat”

RESPONSE: The BHU notes the approval of SOP #1-6 as written, and concurs with the recommendation from the BHUAC on SOP #1-5 and will apply the suggested changes to the final version.

2021 Q1 Update: The formal recommendations brought forward by the BHUAC during the first quarter were as follows:
• The committee reviewed SOPs #1-1, #1-2, #1-3 and #1-4. After the committee reviewed, discussed and made edit suggestions, the Committee recommended that all aforementioned SOPs be approved.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
Department of Justice Tasks / Quarterly Update Report

Task Description
Officer Training on Crisis Intervention

Task Requirements: PPB will continue to train all officers on Crisis Intervention.

Status Complete - pending external review

Action Steps: 1. PPB will identify materials that demonstrate continued commitment to training all officers on Crisis Intervention as a core competency.

Task Date Completed: 10/2/2013  □ Received DOJ Approval?  Approval

Evidence of Completion: 1. 2012-2014 training materials (located in folder #98)

Status Note:

2014 Q1 Update:

2014 Q2 Update: No Advanced Academy was held this quarter.

2014 Q3 Update: No Advanced Academy was held this quarter. Any new officers awaiting training (which includes the rest of the CIT hours begun at DPSST) are not allowed to work the streets by themselves but must be with a coach.

2014 Q4 Update: In October, BHU representatives, along with training division staff, observed DPSST’s basic Crisis Intervention (C-I) training classes and scenarios to assist the Training division in conducting a needs assessment to refocus PPB’s basic C-I training on de-escalation, scenarios, and the elimination of redundancy with DPSST C-I training.

2015 Q1 Update: PPB training division conducted basic Crisis Intervention training (CIT) during the PPB Advanced Academy, sponsoring a 40-hour basic CIT course for some PPB officers and Multnomah County Sheriff deputies and conducting a 4-hour basic CIT overview for the Metro Reserve Officer Academy.

2015 Q2 Update: No Advanced Academy was held this quarter. Any new officer awaiting the next scheduled Academy where the CIT is conducted is not allowed to work the streets alone but must be with a coach.

2015 Q3 Update: PPB Training division conducted basic Crisis Intervention training (CIT) during the PPB Advanced Academy, sponsoring a 40-hour basic CIT course for five PPB officers.

2015 Q4 Update: No Advanced Academy was held this quarter. Any new officer awaiting the next scheduled Academy where the CIT is conducted is not allowed to work the streets alone but must be with a coach.

2016 Q1 Update: Advanced Academy was commenced this quarter with 18 probationary officers. As of March 31, 2016, they had received 13 of the scheduled 16.5 hours of CIT Training after completing the initial 16.5 hours at basic training at DPSST.

2016 Q2 Update: PPB completed an Advanced Academy with 18 probationary officers in Q2. During Q2, the students had 3.5 hours of CIT training to complete a total of 16.5 during the entirety of the Advanced Academy. With the addition of the training received at DPSST, these officers have all completed 40 hours of CIT training. Most of these officers are still working with coaches, but the ones who are performing patrol or call-response duties on their own have only done so after finishing the Advanced Academy. Four new officers hired in Q1 have completed the basic academy in Q2 with 23.5 hours of CIT training. They will finish the 40 hours of CIT training in the next Advanced Academy due to start in September. PPB currently has six other officers who are still attending the basic academy. None of the recent basic academy graduates or any of the current basic academy students have assumed any patrol duties on their own.

2016 Q3 Update: PPB did not have an Advanced Academy during Q3.

2016 Q4 Update: PPB did not have an Advanced Academy during Q4. The Training Division will continue to provide officers with 40 hours of CIT training when new officers are hired and they attend the Basic and Advanced Academies.

2017 Q1 Update: During Q1, the Training Division held Advanced Academy 2017-1 in which 15 members completed the 40-hour CIT curriculum.

2017 Q2 Update: The Training Division did not conduct any CIT courses to Advanced Academy students during this reporting period. All of the
2017 Q3 Update: PPB had anticipated that Advanced Academy 2017-2 would be completed in Q3. Due to schedule changes, Advanced Academies 2017-2 and 2017-3 will not be completed until 2017 Q4 but do include the CIT training.

2017 Q4 Update: The Training Division completed two Advanced Academies during 2017Q4. CIT training was a part of the academy's curriculum.

2018 Q1 Update: The Training Division is currently running two Advanced Academies during 2018 Q1 that have CIT training as part of the curriculum. However, they will not graduate until 2018 Q2. These officers will receive their CIT certification upon the completion of their Advanced Academy. AA 2018-1 ends on May 18 and AA 2018-2 ends on June 18.


2018 Q3 Update: The Training Division is currently running two Advanced Academies during 2018 Q3/4 and the members will not graduate until the fourth quarter. These officers will receive their CIT certification upon the completion of their Advanced Academy. AA 2018-3 ends on October 30, 2018 and AA 2018-4 ends on December 3, 2018. The CIT certifications will be included in 2018Q4 report.

2018 Q4 Update: The Training Division completed two Advanced Academies during 2018 Q4. AA 2018-3 ended on October 30, 2018 and AA 2018-4 ended on December 3, 2018. The CIT certifications are listed as part of their completion requirements. Between the two academies, 34 officers received their certification.

2019 Q1 Update: The Training Division is currently conducting Advanced Academy 2019-1. The officers attending will receive their CIT certification upon the completion of the Advanced Academy. AA 2019-1 ends on May 6, 2019 and their CIT certifications will be included in the 2019Q2 report.

2019 Q2 Update: The Training Division concluded Advanced Academy 2019-1 on May 6, 2019. The officers attending received their CIT certification upon completion of the Advanced Academy. Thirteen (13) officers were certified in 2019-1. Advanced Academies 2019-2 and 2019-3 will begin this quarter and conclude in Q4.

2019 Q3 Update: The Training Division began two advanced academy classes in this quarter (2019-2 and 2019-3). However, neither academy class concluded in Q3. Officers attending these classes will receive the CIT certification upon completion of the academy. These will be included in the 2019Q4 update.

2019 Q4 Update: The Training Division graduated two academy classes in the fourth quarter. Fifteen students graduated Academy 2019-2 certified as CIT. Ten students graduated from 2019-3 with their CIT certification. All the students who successfully graduated the Advanced Academy were certified.

2020 Q1 Update: No Advanced Academy was held this quarter. Any new officer awaiting the next scheduled Academy where the CIT is conducted is not allowed to work the streets alone but must be with a coach.

2020 Q2 Update: Advanced Academy 2020-1 began this quarter but has not been completed. The Training Division will report the number of officers successfully completing CIT Training in the next quarter. Any recruit awaiting CIT certification is not allowed to work the patrol without a coach.

2020 Q3 Update: Advanced Academies 2020-1 and 2020-2 completed their training during Q3; with 22 recruits for 2020-1 and 13 recruits for 2020-2 becoming CIT trained for a total of 35 new officers trained. Recruits are not allowed to work without a coach until receiving CIT training.

2020 Q4 Update: Advanced Academy 2020-3 completed their training during Q4. Fifteen of sixteen recruits successfully graduated from the Academy and received CIT certification. The next Advanced Academy is scheduled to begin in May, 2021. The PPB anticipates 32 recruits attending that academy. Officers are not allowed to work without a coach until they have received CIT certification.

2021 Q1 Update: No Advanced Academy was held this quarter. Any new officer awaiting the next scheduled Academy where the Crisis Intervention Training is conducted is not allowed to work the streets alone but must be with a coach.
The next Advanced Academy is scheduled to begin in May, 2021 and will include Crisis Intervention training for recruits.
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Task Description
C-I Training Requirements

Task Requirements: PPB agrees to continue to require a minimum of 40 hours of C-I training to all officers before officers are permitted to assume any independent patrol or call response duties. Additionally, PPB shall include C-I refresher training for all officers as an integral part of PPB’s on-going annual officer training. PPB’s Training Division, in consultation with ABHU Advisory Committee, shall determine the subjects and scope of initial and refresher C-I training for all officers.

Status: Actively in Process

Action Steps:
1. PPB will document requirements for CI training in advance of graduating the police academy
2. PPB will identify how Training Division has included Crisis Intervention refresher training to date
3. BHUAC will review current training curricula and will work with Training staff to identify opportunities for CI refresher training in the future

Task Date Completed: ☐ Received DOJ Approval? Approval

Evidence of Completion:
1. DPSST Training Outline
2. PPB Advanced Academy Training Outline
3. 2013 In-service Training Outline/Slides
4. 2013 In-service schedule

Status Note:

2014 Q1 Update: No Advanced Academy conducted this quarter. Any new officers awaiting that training (which includes the rest of the CIT hours begun at DPSST) are not allowed to work the streets by themselves but must be with a coach.

2014 Q2 Update: No Advanced Academy scheduled this quarter.

2014 Q3 Update: No Advanced Academy held this quarter. Next one is scheduled from October 23, 2014 until February 5, 2015. Training Division planning for inclusion of CIT Refresher course in 2015 In-Service.

2014 Q4 Update: The BHU CIT Coordinator co-facilitated the PPB Advanced Academy Crisis Intervention Training on November 19, November 24, and December 3. The BHU clinicians also provided support to Advanced Academy Crisis Intervention scenarios.

2015 Q1 Update: During this quarter, the CIT Coordinator supported the PPB training division in conducting basic Crisis Intervention training (CIT) during the PPB Advanced Academy, sponsoring a 40-hour basic CIT course for some PPB officers and Multnomah County Sheriff deputies and conducting a 4-hour basic CIT overview for the Metro Reserve Officer Academy.

2015 Q2 Update: In the second quarter, the CIT Coordinator supported the PPB training division in conducting crisis intervention training for 17 PPB Reserve officers and 3 Mentally Ill Offender Probation Officers on June 23, 24 and 27, 2015. This training included an overview of the BHU and availability of ECIT officers as well as other community resources to assist on crisis calls.

2015 Q3 Update: In the third quarter, the CIT Coordinator supported the PPB Training Division in conducting crisis intervention training for PPB’s Advance Academy on August 19, 24, 25 and September 15, 22, 28.

The CIT Coordinator also supported the PPB Training Division in completing the 40-hour crisis intervention training course for 17 PPB Reserve officers and 3 Mentally Ill Offender Probation Officers on July 7, 9, and 11. This training concluded with scenario-based training on response to crisis calls.

The BHUAC voted on CIT topics for the Annual In-Service training. The top three topics included Juvenile Mental Health and the Juvenile System, a Peer Panel, and new/updated policies related to BHU and ECIT Program. The BHU forwarded this information to the Training division. As a result Juvenile Mental Health and Mental Health policy updates will be incorporated into PPB’s 2016 in-service training for CI refresher training for all PPB members.

2015 Q4 Update: During this quarter, the CIT Coordinator assisted the Training Division in completing the basic crisis intervention training for new PPB officers attending the 2015 Advanced Academy.
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2016 Q1 Update: During this quarter, the CIT Coordinator assisted the Training Division in completing the basic crisis intervention training for new PPB officers attending the 2016 Advanced Academy. The CIT Coordinator also assisted the Training Division in conducting a 4-hour mental health training class for the Metro Reserve Police Academy sponsored by Clackamas County Sheriff’s Office. This training is provided to reserve officers from law enforcement agencies throughout the state of Oregon.

2016 Q2 Update: There was no In-Service training during Q2. There will be a CI refresher component to the 2016 In-Service being planned to commence in September.

2016 Q3 Update: The 2016 In-service training plan included a CI refresher component in the form of scenarios as well as a session on newly enacted Directive 850.20.

2016 Q4 Update: The 2016 In-service concluded in November. The training plan included a CI refresher component in the form of scenarios as well as a session on newly enacted Directive 850.20.

2017 Q1 Update: The 2017 In-service commenced in March. The training plan included a CI refresher component on the Scaled Crisis Response Model.

2017 Q2 Update: The Training Division continued to teach a CI refresher component on the Scaled Crisis Response Model during the 2017 Q2 In-service.

2017 Q3 Update: The second half of 2017 In-service began in September. It contains scenarios that address CI refresher training.

2017 Q4 Update: As noted last quarter, the Training Division incorporated CI refresher training into two of the scenarios which occur on Day 2 of 2017-2 Inservice Training. That training continued through this quarter and ended in December.

2018 Q1 Update: ECIT Refresher training was held February 5 – 9, 2018. The PVO inservice held this quarter did not contain any CI refresher courses.

2018 Q2 Update: The Training Division incorporated CI refresher training into the 2018-2 In-service class on the Decision Making Model.

2018 Q3 Update: The Training Division incorporated CI refresher training into the 2018-3 Fall In-service Procedural Justice and Implicit Bias class and a scenario involving de-escalation.

2018 Q4 Update: The 2018-3 Fall Inservice ran throughout this quarter, ending in December. It included a Procedural Justice and Implicit Bias class and a scenario involving de-escalation which served as the Bureau's CI Refresher training.

2019 Q1 Update: The Training Division did not conduct In-service this quarter so there was no CI Refresher Training during 2019Q1.

2019 Q2 Update: The Training Division did not conduct In-service this quarter so there was no CI Refresher Training during the second quarter.

2019 Q3 Update: The 2019 Annual Inservice began at end of August and runs through December of 2019. The training contains a procedural justice scenario which requires the de-escalation of a veteran in crisis. This serves as the CI refresher component.

2019 Q4 Update: The 2019 Inservice continued through this quarter until mid-December. The procedural justice scenario which requires the de-escalation of a veteran in crisis served as the CI refresher component.

2020 Q1 Update: The 2020 In-service commenced on January 20th. It was scheduled to continue until May. This in-service included a scenario involving youth in distress which was developed in conjunction with Youth Educating Police (YEP). This scenario was a follow-up to a video training focused on improving PPB response to youth. All members were required to view it prior to attending In-service as the scenario served as an opportunity for officers to practice these skills described in the video. In-service also included a scenario involving a person in crisis which required officers to employ a coordinated response to de-escalate the situation. Both of these served as CI refresher components.

However, due to the COVID-19 Pandemic, In-service had to be suspended in March and thus not all officers attended in-service this year in person. The Training Division was able to deliver the classroom portion of in-service via video. It is working on how it will provide the remaining skills training. Those officers who did not attend in-service for the YEP scenario did receive the video portion of that instructional set.
The Training Division did not provide In-service training this quarter and has not completed the 2020 In-service Training cycle due to complications created by the COVID-19 Pandemic. All officers have completed the video portion of the Youth Educating Police training. The Training Division is continuing to explore how it can provide supplemental training in a manner consistent with safety precautions implemented in response to the Pandemic.

The Training Division and BHU are developing a video on how best to utilize ECIT officers, in addition to other mental health reminders, for its required annual CIT refresher class. It will be released in early November.

Following up on the plan outlined in the Q3 report, the Training Division and BHU released a video on how best to utilize ECIT assets. This was released to meet the PPB’s ongoing mental health training requirements. The video was released on 10-29-2020. 841 members have successfully completed the training. Three members have not completed the training due to being on leave of service/sick leave (LOS), pending retirement etc.

The 2021 Annual In-service began this quarter. As a portion of this In-service, officers are provided a scenario which requires establishing a communication team to coordinate communications with a person in crisis (the suspect in the scenario). During the debrief, these efforts are addressed from an on organization standpoint (i.e. did the incident command established a communication team, did the team provide updates to those onscene, was the communicator provided with a coach etc.) as well as an individual communication standpoint (i.e. did the communicator utilize active listening, was the communicator able to identify specific topics which either assist in communication or which detracted from the communication, etc.).

This scenario also has a procedural justice element, assessing the team’s interaction with the incident’s victim. This effort is debriefed from an organizational standpoint (i.e. was the victim assigned an officer to work with her, was the victim moved to a safe location, etc.) as well as from a procedural justice standpoint (i.e. was the victim informed of what was occurring, was the victim allowed to express her concerns, did the officer assigned to victim express concern for her welfare etc.). These efforts are being evaluated in systematic fashion for later review by the Division’s analyst.
Establishment of ECIT

**Task Description**

PPB shall establish a Memphis Model Crisis Intervention team ("C-I Team") that shall be comprised of officers who volunteer for assignment. The number of C-I Team members will be driven by the demand for C-I Team services, with an initial goal of 60-80 volunteer, qualified officers.

*NOTE: PPB refers to "C-I Team" as "Enhanced Crisis Intervention Trained officers" (ECIT officers)

**Status**

Complete - pending external review

**Task Requirements:**

1. BHU (with BHUAC) will develop PPB Enhanced Crisis Intervention Team (ECIT) positions and function
2. BHU will develop and present roll call video to PPB officers to educate them on the new ECIT program
3. BHU and Training Division will train volunteer members of the new ECIT
4. BHU will provide annual opportunities for ECIT training
5. BHUAC will advise on changes to ECIT training based on information and data reviewed and analyzed
6. PPB will establish annual 8-hour Crisis Intervention Training in-service for ECIT officers
7. BHU created an internal ECIT Advisory Committee

**Evidence of Completion:**

1. ECIT Personnel Roster
2. ECIT Selection Process documentation (located in folder #101)
3. ECIT class roster for BHUAC attendees (located in folder #102)
4. 2013 ECIT Roll Call information
5. ECIT Advisory Council Meeting example Agenda and Minutes

**Task Date Completed:**

5/31/2013

**Received DOJ Approval?**

Approval

2014 Q1 Update:

Applications accepted from volunteer officers for next training set for April 8-11, 2014.

2014 Q2 Update:

Twenty-five officers participated in the ECIT program held April 8-11. Upon completion, there were 78 ECIT designated officers in the Bureau.

2014 Q3 Update:

ECIT Advisory committee held its quarterly meeting to discuss relevant issues.

2014 Q4 Update:

The ECIT Advisory committee did not meet this quarter. Due to the holidays in December, they scheduled the quarterly meeting for early January.

2015 Q1 Update:

No new ECIT officers were added this quarter. The next annual ECIT course is scheduled for November 17-20, 2015. It is anticipated that approximately 25 additional ECIT members will be trained at that time.

The BHU meets quarterly with the ECIT Advisory Council to determine effectiveness of the ECIT program, determine additional resources needed at the operational level, and identify additional training requirements and areas for improvement. An ECIT Advisory Council meeting was held on January 7, 2015 to discuss implementation of ECIT report templates to meet DOJ data collection requirements. The next ECIT Advisory Council meeting is scheduled for April 29, 2015.

2015 Q2 Update:

No new ECIT officers were added this quarter. The next annual ECIT course is still scheduled for November 17-20, 2015.

The BHU meets quarterly with the ECIT Advisory Council to determine effectiveness of the ECIT program, determine additional resources needed at the operational level, and identify additional training requirements and identify areas for improvement. An ECIT Advisory Council meeting was held on April 29, 2015 to discuss:

• ECIT Report Template
• Threat Advisory Team overview
• PPB Mental Health Directives update
• RegJIN transition and BERS Referrals to the BHU for follow up

2015 Q3 Update:

No new ECIT officers were added this quarter. The next annual ECIT course is scheduled for November 17-20, 2015. The ECIT
The BHU meets as needed with the ECIT Advisory Council to determine the effectiveness of the ECIT program, what additional resources are needed at the operational level, and to identify additional training requirements and areas for improvement. There was no ECIT Advisory Council meeting in this quarter. The next ECIT Advisory Council meeting is scheduled on October 14, 2015.

A total of 77 ECIT officers/sergeants are currently trained and working throughout the Police Bureau to assist in behavioral crisis calls. One ECIT officer retired from the Bureau this quarter. The November 2015 ECIT course announcement was posted from September 9-23 generating 37 applicants. The BHU Sergeant initiated the screening process this quarter. Ultimately, 25 officers will be selected to attend the November training.

2015 Q4 Update: A 40-hour ECIT course was conducted from November 17-20, 2015. There were 37 officers that volunteered for this training, of which 25 officers were selected. Additionally, officers new to the BHU within the last year attended the training. So a total of 28 new ECIT members were certified. There are now 105 ECIT PPB members.

The BHU hosted an internal ECIT Advisory Council meeting this quarter on October 14, 2015. The primary discussion was centered on receiving operational feedback on the proposed Mental Health Contact Mask that was in development with a planned implementation date of January 1, 2016.

2016 Q1 Update: At the end of the quarter there are a total of 103 ECIT members certified and working throughout the police bureau to assist on behavioral health crisis calls. Two ECIT members separated from the Bureau, one transferred to another law enforcement agency, the other transitioned to a non-sworn position. The next ECIT course is projected for Fall of 2016.

The internal ECIT Advisory Council did not meet this quarter. The primary topics of discussion, the Mental Health Contact Mask and the updated PPB Mental Health directive, were delayed. The meeting was rescheduled for next quarter.

2016 Q2 Update: PPB continues to maintain its improved version of the Memphis Model.

There are a total of 99 ECIT members certified and working throughout the Bureau to assist on behavioral health crisis calls. Since last quarter, four members retired/resigned from PPB.

The next ECIT certification course is scheduled for December 13-16, 2016.

The internal ECIT Advisory Council met in June 2016. The primary topics of discussion were the Mental Health Contact Mask, the new Mental Health Response Directive, BHU STS temporary beds and the Unity Center. The ECIT Advisory Council consists of ECIT officers, patrol officers and sergeants from each precinct to provide operational feedback to the BHU on program effectiveness.

2016 Q3 Update: The Portland Police Bureau continues to implement its modified and acclaimed version of the Memphis Crisis Intervention Model through the Behavioral Health Unit and the Enhanced Crisis Intervention Team (ECIT). PPB has dedicated significant personnel resources to meeting the core elements of the Memphis Model as it strives to create a model that addresses the unique nature of its own community.

As of September 30, 2016, there are a total of 13 members in BHU and 98 ECIT certified PPB members.

The internal ECIT Advisory Council did not meet this quarter but communication with advisory council members remains open at all times to address any concerns or suggestions to improve the ECIT Program.

2016 Q4 Update: A 40-hour ECIT course was conducted from December 13-16, 2016. There were 25 officers that volunteered for this training, of which 22 officers were selected. Due to inclement weather, the class missed 8 hours of training. The material missed will not prohibit this class from filling the role of an ECIT officer, however the material will be covered in a make-up day during Q1 of 2017.

There are now a total of 117 sworn ECIT PPB members.

The internal ECIT Advisory Council did not meet this quarter but communication with advisory council members remains open at
2017 Q1 Update: The makeup day for the missed classes from the snow day that occurred during the week of December's ECIT training was held on February 16, 2017. Lesson plans for this training are included with the 2016 Q4 supporting documentation.

No changes were made to ECIT qualifications this quarter, nor were there any additional ECIT officers who completed the certification process. The PPB is now exceeding its initial goal of 60 – 80 volunteer, qualified officers with a total of 117 certified ECIT members.

During this quarter, the BHU CIT Coordinator assisted the PPB Training Division in providing 16 hours of crisis intervention training to recruit officers who participated in the PPB Advanced Training Academy.

The internal ECIT Advisory Council met on February 15, 2017. The ECIT Advisory Council consists of ECIT officers, patrol officers and sergeants from each precinct to provide operational feedback to the BHU on program effectiveness. The primary topics of discussion included the Mental Health Contact Mask, Mental Health-related data, ECIT coverage at the precincts and future ECIT classes, dispatching ECIT officers to calls per PPB Directive 850.20, PPB Mental Health Directives updates, and Unity Center updates.

2017 Q2 Update: The PPB continues to implement its modified version of the Memphis Crisis Intervention Model through the Behavioral Health Unit and the Enhanced Crisis Intervention Team (ECIT). PPB has dedicated significant personnel resources to meeting the core elements of the Memphis Model as it strives to create a model that addresses the unique nature of its own community.

The internal ECIT Advisory Council met on May 4, 2017. The ECIT Advisory Council consists of ECIT officers, patrol officers and sergeants from each precinct to provide operational feedback to the BHU on program effectiveness. The primary topics of discussion included: changes and rollout of the mental health text template, facility issues and Unity Center updates, expectations for ECIT officers regarding resource referrals, status of ECIT officers during the IA process and post findings, ECIT-related data, the next ECIT class, and ECIT in-service.

A 40 hour ECIT course will be conducted in July 2017. The selection of the officers attending that class was completed in this quarter.

2017 Q3 Update: The Portland Police Bureau continues to utilize its modified version of the Crisis Intervention Team, based on the Memphis Model, through the Behavioral Health Unit (BHU) and the Enhanced Crisis Intervention Team (ECIT). PPB has dedicated significant personnel resources to meeting the core elements of the Memphis Model while concurrently responding to the demands and desires of this community the system is designed to serve. The Bureau strives to establish a response framework that addresses the unique nature of its own community.

Another 40-hour ECIT course was conducted from July 25 – 28, 2017. There were 27 officers who volunteered for this training, of which 20 officers were selected and successfully graduated from the course. As a result, there are now 118 operational (in uniform assignments) ECIT members of a total of 133 active sworn ECIT members. This number clearly far surpasses the Agreement's goal of 60-80 officers.

PPB is being required to justify its use of the hybrid model in order to achieve substantial compliance in this arena. In the COCL’s 2016 Q3&4 Compliance report, they provided an outline of suggested analyses that may help PPB evaluate the adequacy of their model of mental health crisis response. That included data and information around mental health calls and ECIT responses to those calls. These outcomes also included temporal relationships, as well as shift distribution relationships. PPB has been using similar data points to identify training and workload needs of the ECIT program. This type of data and information has been presented to the BHUAC and the ECIT Advisory Council.

Also, in order to demonstrate that PPB has a “capable system and resources for responding to persons in mental health crisis,” during this quarter PPB began to develop a methodology to assess the differences in outcomes for ECIT and non-ECIT responses to
mental health related calls.

This assessment will be combined with the other analyses the COCL recommended in a comprehensive report. Results of these assessments will be forthcoming.

2017 Q4 Update: The Portland Police Bureau continues to utilize its modified version of the Crisis Intervention Team and strives to maintain a response framework that addresses the unique nature of its own community.

DOJ has asked PPB to demonstrate through data analysis that this model provides an effective mental health crisis response system. In the COCL’s 2016 Q3&4 Compliance report, they provided an outline of suggested analyses that may help PPB evaluate the adequacy of their model. That included data and information around mental health calls and ECIT responses to those calls. These outcomes also included temporal relationships, as well as shift distribution relationships. PPB has been using similar data points to identify training and workload needs of the ECIT program. This type of data and information has been presented to the BHUAC and the ECIT Advisory Council.

Also, in order to demonstrate that PPB has a “capable system and resources for responding to persons in mental health crisis,” during this quarter PPB undertook an analysis to assess the differences in outcomes for ECIT and non-ECIT responses to mental health related calls. This assessment was combined with the other analyses the COCL had recommended into a comprehensive report. Results of these assessments will be included in an upcoming DOJ quarterly report.

2018 Q1 Update: In order to demonstrate that PPB has a “capable system and resources for responding to persons in mental health crisis,” during this quarter PPB, along with its partner BOEC, revised its analysis to assess the differences in outcomes for ECIT and non-ECIT responses to mental health related calls based on feedback from COCL. This assessment was combined with the other analyses the COCL had recommended into a comprehensive report.

2018 Q2 Update: The Portland Police Bureau continues to utilize its modified version of the Crisis Intervention Team.

During this quarter PPB, along with its partner BOEC, conducted an additional six months’ worth of analysis to assess the differences in outcomes for ECIT and non-ECIT responses to mental health related calls based on feedback from COCL. The results of this assessment were comparable to those of the previous six months.

The BHU continued to develop the final lineup of instructors for the upcoming ECIT class, which includes local psychiatric professionals, mental health providers, family advocates and mental health consumers as well as BHU staff. This class is scheduled to be held in early August.

BHU will complete the selection/vetting processes in accordance with the SA in the beginning of July.

2018 Q3 Update: The Portland Police Bureau continues to utilize its modified version of the Crisis Intervention Team.

In this quarter, based on feedback from COCL, PPB, along with its partner BOEC, conducted an additional three months’ worth of analysis to assess the differences in outcomes for ECIT and non-ECIT responses to mental health related calls. The results of this assessment were comparable to those of the previous six months.

Another 40-hour ECIT course was conducted from August 7 – 10, 2018. There were 16 officers who were certified during this training. As a result, there are now 130 operational (in uniform assignments) ECIT members of a total of 146 certified members. This number obviously far surpasses the Agreement's goal of 60-80 officers.

2018 Q4 Update: In this quarter, based on feedback from COCL, PPB and its partner BOEC conducted an analysis of an additional six months’ (04/01/08 – 09/30/18) of data to further assess the Bureau's mental health crisis response. It examined a number of arenas including differences in outcomes for ECIT and non-ECIT responses to mental health related calls. The results of this assessment will be reported on in 2019 Q1.

There are now 130 operational (in uniform assignments) ECIT members of a total of 146 certified members. This number obviously far surpasses the Agreement's goal of 60-80 officers.

2019 Q1 Update: To further assess whether PPB has a “capable system and resources for responding to persons in mental health crisis,” PPB, along
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with its partner BOEC, submitted its second analysis of the differences in outcomes for ECIT and non-ECIT responses to mental health related calls. This assessment was combined with the other analyses the COCL and the Department of Justice had recommended into a comprehensive report.

There are now 130 operational (in uniform assignments) ECIT members of a total of 146 certified members. This number surpasses the Agreement's goal of 60-80 officers.

2019 Q2 Update: There are now 130 operational (in uniform assignments) ECIT members of a total of 146 certified members. This number surpasses the Agreement's goal of 60-80 officers.

2019 Q3 Update: There are now 128 operational (in uniform assignments) ECIT members of a total of 144 certified members. This number surpasses the Agreement's goal of 60-80 officers.

One ECIT officer elected to “pause” their ECIT status in September 2019.

The BHU staff began to review the applicant list for the forty hour ECIT class scheduled for November 5-8, 2019.

2019 Q4 Update: Another 40-hour ECIT course was conducted from November 5-8, 2019. There were 20 officers who were certified during this training. As a result, there are 148 operational (in uniform assignments) ECIT PPB members with a total of 164 sworn ECIT PPB members.

This number far surpasses the Agreement's goal of 60-80 officers.

2020 Q1 Update: There are 131 operational (in uniform assignments) ECIT PPB members within the total of 161 sworn ECIT PPB members.

This number far surpasses the Agreement's goal of 60-80 officers.

2020 Q2 Update: There remain 131 operational (in uniform assignments) ECIT PPB members within the total of 161 sworn ECIT PPB members.

This number far surpasses the Agreement's goal of 60-80 officers.

2020 Q3 Update: Due to multiple retirements, there are 124 operational (in uniform assignments) ECIT PPB members within the total of 153 sworn ECIT PPB members.

2020 Q4 Update: Retirements and resignations took another couple of ECIT officers so there are now 123 operational (in uniform assignments) ECIT members within the total of 151 sworn ECIT PPB members.

BHU hosted an ECIT Advisory Council Meeting on December 11. In attendance was the CIT Coordinator, a BHU Sergeant, the BHU Central Precinct BHRT clinician and officer, an ECIT and non-ECIT officer and sergeant from both East Precinct and Central Precinct. North Precinct was unable to attend due to call volume. Topics covered during the meeting included response to mental health facilities; interactions and some recent trends in calls covering Project Response; the necessity to clearly articulate a mental health nexus on POHs when drug or alcohol intoxication is present; a trend of expecting ECIT to do all documentation and follow-up on ECIT calls; and a feeling by patrol officers and sergeants that there are not enough ECIT officers on certain shifts at certain times.

2021 Q1 Update: There are 118 operational (in uniform assignments) ECIT PPB members within the total of 146 sworn ECIT PPB members.

BHU will be hosting an ECIT Advisory Council Meeting on April 1 and details of that meeting will be reported on in the next quarter.

On March 26th, 2021 the CIT Coordinator rode in a partner car with an ECIT officer at Central Precinct to discuss the ECIT program and evaluate how it is functioning on patrol.

2021 Q2 Update:

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2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
**Task Description**

ECIT member qualifications

**Task Requirements:**
No officers may participate in C-I Team if they have been subject to disciplinary action based upon use of force or mistreatment of people with mental illness within the three years preceding the start of C-I Team service, or during C-I Team service. PPB, with the advice of the ABHU Advisory Committee, shall define criteria for qualification, selection, and ongoing participation of officers in the C-I Team.

*NOTE: PPB refers to "C-I Team" as "Enhanced Crisis Intervention Trained officers" (ECIT officers)*

**Status**
Complete - pending external review

**Action Steps:**
1. BHU will perform background review of all volunteer ECIT officers, per the requirements of the agreement and other standing PPB requirements
2. PPB will document review in confidential BHU personnel files

**Task Date Completed:**
5/31/2013

**Received DOJ Approval?**
Approval

**Evidence of Completion:**
1. Vetting questions for ECIT applicants
2. ECIT vetting process overview
3. E-mails with Precinct Commands covering ECIT officer and Advisory Board selection
4. ECIT position vetting - Sgt. Recommendation forms
5. ECIT Officer posting, 10.15.12
6. PPB ECIT qualifying roster (confidential, available upon request)

**Status Note:**

2014 Q1 Update: During this time period, BHU and Training staff engaged in the screening process utilizing this criteria for the next group of officers who volunteered to participate in ECIT training to be held in April.

2014 Q2 Update: All of the officers who participated in the April training met the qualifications outlined in the Agreement.

2014 Q3 Update: No changes were made to the qualifications this quarter nor were any additional officers trained for ECIT.

2014 Q4 Update: The qualifications for participation in ECIT remain the same. There was no ECIT course offered this quarter so no screening of applications was necessary.

2015 Q1 Update: The ECIT selection process will not start until Fall 2015. However, when it is initiated, these criteria will be applied. BHU Sergeant is working with IA to establish a protocol to be notified if an ECIT officer is subsequently the subject of disciplinary action based upon use of force or mistreatment of persons with mental illness.

2015 Q2 Update: The BHU lieutenant coordinated with Professional Standards Division (PSD) to ensure the BHU receives notification on any ECIT member subject to disciplinary action based upon use of force or mistreatment of people with mental illness. This process will be documented in the PSD standard operating procedure (SOP) that is currently being written. The BHU lieutenant also receives all PPB After Action Reports that involve the use of force on persons with mental illness for review.

2015 Q3 Update: The BHU Sergeant(s) began the screening process of the officers who volunteered to participate in ECIT training scheduled in November 2015. The BHU Sergeant(s) are working with Professional Standards Division and the supervisors of officers interested in ECIT as well as independently conducting a review of each applicant’s EIS record in order to determine eligibility.

2015 Q4 Update: The BHU Sergeants finished the screening process of the volunteers who applied to participate in ECIT training scheduled in November 2015. The BHU Sergeants consulted with Professional Standards Division, the Internal Affairs Division, and the supervisors of these officers as well as independently conducted a review of each applicant’s EIS record in order to determine eligibility.

The BHU Sergeants also used ECIT related data (Dispatched Calls, ECIT Templates, and Officer Rosters) to help identify any trends and guide decision making in the selection of potential ECIT officers.
2016 Q1 Update: No changes were made to the qualifications this quarter. However, the Behavioral Health Unit Advisory Committee (BHUAC) reviewed SOP 3.3 and discussed revisions to the criteria for qualification, selection, and ongoing participation. The minutes and monthly report for this meeting have not yet been approved by the committee nor have the changes to SOP 3.3 been finalized. This will occur and be reported in the next quarter. There were no additional officers trained for ECIT during this time period.

2016 Q2 Update: No changes were made to ECIT qualifications this quarter nor were there any additional officers ECIT certified.

The BHUAC reviewed SOP 3.3 ECIT. The draft changes in this document contain the criteria for qualification, selection, and ongoing participation of ECIT officers. The BHU approved the draft SOP with additional recommendations. This SOP requires a review and signature from the Commander of Central Precinct so will be included in the next quarterly report.

2016 Q3 Update: The BHUAC took the opportunity to review SOP 3.3 ECIT. The draft changes in this document contain the criteria for qualification, selection, and ongoing participation of ECIT officers. The BHU approved the draft SOP with additional recommendations. The SOP was reviewed and signed by the Commander of Central Precinct.

2016 Q4 Update: The BHU Sergeants finished the screening process of the officers who applied to participate in ECIT training scheduled in December 2016. The BHU Sergeants consulted with Professional Standards Division, the Internal Affairs Division, and the supervisors of these officers as well as independently conducted a review of each applicant’s EIS record in order to determine eligibility.

2017 Q1 Update: No changes were made to ECIT qualifications this quarter nor were there any additional officers ECIT-certified.

2017 Q2 Update: This quarter the BHU Sergeant(s) began the screening process of the officers who volunteered to participate in ECIT training scheduled for July, 2017. The BHU Sergeant(s) followed the requirements of the applicable SOP by contacting Professional Standards Division and the supervisors of officers interested in ECIT as well as independently conducting a review of each applicant’s EIS record in order to determine eligibility.

2017 Q3 Update: The BHU Sergeants finished the screening process of the 27 officers who applied to participate in ECIT training scheduled in July 2017. The BHU Sergeants consulted with Professional Standards Division, the Internal Affairs Division, and the supervisors of these officers as well as independently conducted a review of each applicant’s EIS record in order to determine eligibility.

2017 Q4 Update: No changes were made to ECIT qualifications this quarter, nor were there any additional officers ECIT-certified.

The BHU is planning to work with the BHUAC to modify SOP 3.3, in the January 2018 meeting.

2018 Q1 Update: No changes were made to ECIT qualifications this quarter, nor were any additional officers ECIT-certified.

However, the BHU began preparations for the next ECIT class, with a focus on identifying instructors who will include mental health providers, family advocates and mental health consumers as well as BHU staff. This class is scheduled for Q3 of this year. BHU will initiate the application and the selection/vetting processes in accordance with the SA in the next quarter.

2018 Q2 Update: No changes were made to ECIT qualifications this quarter, nor were any additional officers ECIT-certified.

The BHU staff reviewed the applicant list for the forty hour ECIT class scheduled for August 7th through 10th.

2018 Q3 Update: No changes were made to ECIT qualifications this quarter.

The BHU Sergeants finished the screening process of the volunteers who applied to participate in ECIT training scheduled in August 2018. The BHU Sergeants consulted with Professional Standards Division, the Internal Affairs Division, and the supervisors of these officers as well as independently conducted a review of each applicant’s EIS record in order to determine eligibility.

The BHU Sergeants also used ECIT related data (Dispatched Calls, ECIT Templates, and Officer Rosters) to help identify any
trends and guide decision-making in the selection of potential ECIT officers.

**2018 Q4 Update:** No changes were made to ECIT qualifications this quarter.

One additional officer was ECIT-certified as that individual made up a training class that was missed because they were “paged out” for another assignment during the August 2018 ECIT certification.

**2019 Q1 Update:** No changes were made to ECIT qualifications this quarter.

**2019 Q2 Update:** No changes were made to ECIT qualifications this quarter.

**2019 Q3 Update:** No changes were made to ECIT qualifications this quarter.

**2019 Q4 Update:** No changes were made to ECIT qualifications this quarter.

The BHU Sergeant(s) finished the screening process of the 37 officers who applied to participate in ECIT training scheduled for November 2019. The BHU Sergeant(s) and Lieutenant worked with Professional Standards Division, the Internal Affairs Division, and the supervisors of officers interested in ECIT; as well as independently conducted reviews of each applicant’s EIS record in order to determine eligibility.

The BHU sergeants also used ECIT related data (Dispatched Calls, ECIT Templates, and Officer Rosters) to help identify any trends and guide decision making in the eligibility and selection of potential ECIT officers.

The ECIT course was offered to 20 officers November 5-8, 2019. All 20 officers successfully completed the course and passed the final exam, and are now certified ECIT officers.

**2020 Q1 Update:** No changes were made to ECIT qualifications this quarter.

**2020 Q2 Update:** No changes were made to ECIT qualifications this quarter.

**2020 Q3 Update:** No changes were made to ECIT qualifications this quarter.

**2020 Q4 Update:** No changes were made to ECIT qualifications this quarter.

**2021 Q1 Update:** No changes were made to ECIT qualifications this quarter.

**2021 Q2 Update:**

**2021 Q3 Update:**

**2021 Q4 Update:**

**2022 Q1 Update:**

**2022 Q2 Update:**

**2022 Q3 Update:**

**2022 Q4 Update:**
Task Description
Specially train ECIT members

Task Requirements: PPB shall specially train each C-I Team member before such member may be utilized for C-I Team operations. PPB, with the advice of the ABHU Advisory Committee, shall develop such training for C-I Team members consistent with the Memphis Model.

*NOTE: PPB refers to "C-I Team" as "Enhanced Crisis Intervention Trained officers" (ECIT officers)

Status Complete - pending external review

Action Steps:
1. BHUAC will develop training materials and course outline for ECIT Training with assistance from Training Division
2. Selected members of ECIT will participate in training
3. BHUAC members will attend ECIT training to provide assessment of training curriculum

Task Date Completed: 5/31/2013

Received DOJ Approval? Approval

Evidence of Completion:
1. Relevant BHUAC agendas/minutes
2. BHUAC ECIT Training Attendance Roster
3. 2013 ECIT Training Plan
4. 2013 ECIT Lesson Plans and Power Points
5. Example ECIT Officer Certification memo

Status Note:

2014 Q1 Update: After a thorough screening process, 25 PPB officers were selected to participate in the April 2014 training.

2014 Q2 Update: The 25 selected went through the specialized 40 hour training in April.

2014 Q3 Update: No ECIT was conducted this quarter.

2014 Q4 Update: No ECIT was conducted this quarter. However, The CIT Coordinator attended the following trainings in order to further develop Crisis Intervention training and the Enhanced Crisis Intervention Team program:
• October 8-9, Civil Commitment Training: Involuntary Commitment Proceedings, instructed by the Civil Commitment Coordinator at the Oregon Health Authority, Addictions & Mental Health Division.
• October 13-15, The International Crisis Intervention Training Conference in Monterey, California.
• October 30, The Children’s Intellectual/Developmental Disability & Mental Health Collaboration Summit sponsored by Providence Medical Center.

2015 Q1 Update: On August 19, 2014, the BHU Advisory Committee provided training recommendations to further develop the Enhanced Crisis Intervention Team (ECIT) training curriculum. All training recommendations were reviewed and this quarter were implemented, as appropriate, into the planned 2015 ECIT course.
During this quarter, the CIT Coordinator also worked with PPB training specialists to review the 2014 ECIT training course evaluation and further develop learning assessment tools for the ECIT curriculum.
During the week of February 17-20, all ECIT officers were required to attend an ECIT briefing to discuss changes and developments in the ECIT program. The primary changes included the requirement of an ECIT report for mental health crisis calls and the addition of access to a threat advisory resource in the BHU. Previous methods of accounting for ECIT dispatched calls had lower results than expected. In response, a new ECIT reporting process was implemented in February 2015. The ECIT report will be required every time an ECIT officer responds and utilizes one's crisis skills, regardless of the location or dispatch method of the call.
Additional local training and conferences were offered to all ECIT officers as noted in the ECIT update handout. Attendance by ECIT members is dependent on their RU scheduling and funding availability.
This included an invitation to attend a conference on February 26th in Portland sponsored by the Oregon Psychiatric Association on the Criminal Justice system and Behavioral Health Issues. The conference focused on fostering local integration between

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During this quarter, six (6) additional ECIT members were able to attend the two-day Applied Suicide Intervention Skills Training (ASIST) sponsored by Multnomah County Mental Health and Addiction Services. Course dates were April 28-29, June 4-5 and June 25-26.

Additionally, BHU members had separate meetings with a member of the Global Health Center at OHSU and a peer support specialist from Urban League of Portland regarding integrating ECIT and BHU programs into diverse populations as well as to seek opportunities to incorporate more diversity into future crisis intervention trainings.

The date on the response memo for the 2014 ECIT recommendations from the BHUAC was inadvertently left the same. The final recommendation memo from the BHUAC was dated on August 19th 2014. Lt Hager’s response memo should have been dated April 1st 2015. While reviewing documents Lt. Hager was unable to locate the final recommendation memo from BHUAC or a response memo. She requested the memo from the BHUAC chair who provided the final document to her on March 27th 2015. The response memo was completed the following week.

BHU Advisory Committee provided training recommendations to further develop the ECIT curriculum.

- The BHUAC voted to approve the qualifications for the ECIT job posting as presented by the BHU with the following changes:
  - add the word “minimum” in front of qualification to apply
  - include “Demonstrate emotional self-management skills” as a prerequisite
  - include “Demonstrate de-escalation skills” as a prerequisite
  - include the statement “There will be an extensive work history review with input from command staff (which will include an Internal Affairs & Employee Information System Review).”

- The BHUAC also voted to approve the following additions to the 2015 ECIT training. These recommendations are currently being incorporated into the next ECIT course:
  - Include self-knowledge and self-care management in the Trauma Informed Care class.
  - Include how mental health presents differently in various age groups during the Mental Status Indicators class
  - Include a person with a co-occurring diagnosis (mental health and I/D disability) in one of the patrol tactics scenarios.

During this quarter, four (4) additional ECIT members were able to attend the two-day Applied Suicide Intervention Skills Training (ASIST) sponsored by Multnomah County Mental Health and Addiction Services. Course dates were August 27-28 and September 22-23.

A 40-hour ECIT course was conducted on November 17-20, 2015. The course included classroom instruction that leads into skills exercises and patrol tactical scenarios that relate to response to crisis calls. This course included 25 community partners participating in instruction, panel discussions and scenario training for the students. It incorporated recommendations from the BHU Advisory Committee (BHUC) review in 2014.

BHUAC members attended the 2015 ECIT course and will provide formal feedback during the next scheduled BHUAC meeting. Also observing were representatives from DOJ and the COCL team.

BHU and 15 ECIT members had the opportunity to attend training at the Pacific NW Negotiators Seminar on October 15-16, 2015. ECIT officers and Bureau of Emergency Communication (BOEC) dispatchers formed a team to participate in the crisis communication skills competition for practical experience and to improve officer and dispatcher collaboration.

The BHU collaborated with local law enforcement partners to develop future crisis intervention training opportunities. The BHU was invited to provide input on the development of future CIT training for the Multnomah County Sheriff’s Office deputies.

During this quarter, five (5) ECIT officers were able to attend the two-day Applied Suicide Intervention Skills Training (ASIST) hosted by Multnomah County Mental Health and Addiction Services. Also, five (5) different ECIT officers attended the first of a new Mental Health training series sponsored by the Oregon Department of Public Safety Standards and Training (DPSST). The first training consisted of one-day training on “Working with Mood and Trauma Related Disorders.” The FBI also sponsored training in Portland on “Active Shooters: Behavioral, Legal, and Threat Mitigation Issues for Mental Health Specialists” which
The BHU collaborated with the Oregon DPSST CIT Coordinator in the updating of the state academy’s mental health training curriculum. The PPB CIT Coordinator and PPB Mental Health Training Specialist reviewed the state academy curriculum and provided input on updates to the program. PPB’s crisis intervention training and ECIT course builds upon the mental health training provided at DPSST.

**2016 Q2 Update:** The first ECIT course was conducted in May 2013. Over the last 3 years, the ECIT training curriculum has been reviewed by the Department of Justice (DOJ), the Community Oversight Advisory Board (COAB), the Compliance Officer Community Liaison (COCL) and the Behavioral Health Unit Advisory Committee (BHUAC). These reviews, in conjunction with PPB ECIT members' feedback, prompted changes to the ECIT training curriculum that was presented in November 2015 ECIT course. Thus a need was identified for those ECIT members who were certified in 2013 and 2014 to receive this updated material and information. So a class was developed and in May 2016, thirty (30) ECIT members attended this refresher In-service training. The remaining ECIT officers will participate in a second offering in July 2016.

One ECIT member attended the Department of Public Safety Standards and Training (DPSST) one-day training on PTSD & Veterans in May 2016.

**2016 Q3 Update:** The BHU completed ECIT in-service for ECIT members who were certified in 2013-2014. This in-service training focused on materials from the updated 2015 ECIT curriculum. The sessions were held on July 8th and July 15th.

This quarter the CIT Coordinator reached out to the Latino Network in order to incorporate learning objectives into ECIT scenarios that would reflect cultural diversity considerations. Latino Network representatives provided insight into what officers may encounter in non-English speaking families, families with mixed immigration statuses and how attitudes towards mental illness may differ in other cultures.

Some ECIT officers volunteered to attend additional training during this quarter. This training included:

- July 11-12 & 13-14: Protecting and Serving: Enhance Law Enforcement Response to Children Exposed to Violence, sponsored by the International Association of Chiefs of Police (IACP), the Yale Child Study Center, and the Office of Juvenile Justice and Delinquency Prevention (OJJDP)
- August 12, 15, 16 & 19: Counseling on Access to Lethal Means (CALM), presented by Elaine Frank, MHS from Dartmouth, New Hampshire
- August 16: Psychopathy and Sociopathy: A criminal justice professional’s guide to identification and strategies for interaction, sponsored by Oregon DPSST
- September 20-22: NW Regional CIT Conference in Tacoma, WA

**2016 Q4 Update:** A 40-hour ECIT course was conducted from December 13-16, 2016. The course includes classroom instruction that builds into skills exercises and patrol tactical scenarios of responding to crisis calls. The one significant change to course material for this class was the addition of cultural diversity to one of the training scenarios.

This scenario was developed in partnership with the Latino Network. Although there were numerous aspects of culture that were discussed the two primary points members of the Latino Network felt were important to address was the fear experienced by some Latino’s around immigration status and the potentially negative impact on using children to interpret for their parents. After developing the scenario with members of the Latino network, this was presented to the Behavioral Health Unit Advisory Committee. Many of the committee members were impressed by higher level concepts incorporated into the scenario. There were no additional recommendations from the committee for changes.

The BHU continues to collaborate with local law enforcement and social service partners to develop future crisis intervention training and information-sharing opportunities. The BHU accepted the invitation to assist Oregon Department of Public Safety Standards and Training (DPSST) with the development of the CIT Northwest Regional Conference scheduled for fall 2017.

**2017 Q1 Update:** On February 16, 2017, the make up classes for the snow day that occurred in December's ECIT training course was held. Lesson
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plans for this training are included with the 2016 Q4 supporting documentation.

The BHU continues to collaborate with local law enforcement and social service partners to develop future crisis intervention training and information-sharing opportunities. Currently, BHU is in the planning stages for its next 40-hour ECIT course, which is scheduled during the third quarter of 2017.

BHU accepted the invitation to assist on a planning committee led by the Oregon Department of Public Safety Standards and Training (DPSST) to develop the CIT Northwest Regional Conference, which is scheduled for fall 2017. This planning work is ongoing.

The BHU CIT Coordinator has become an intermittent instructor at the DPSST basic police academy as an agency loan in the areas of crisis intervention, ethics and professionalism. The CIT Coordinator periodically assists with instruction.

2017 Q2 Update:

The BHU continues to collaborate with local law enforcement and social service partners to develop future crisis intervention training and information-sharing opportunities. Currently, BHU is in the planning stages for its next 40 hour ECIT course which is scheduled for July, 2017.

BHU accepted the invitation to assist on a planning committee led by the Oregon Department of Public Safety Standards and Training (DPSST) to develop the CIT Northwest Regional Conference, which is scheduled for fall 2017. This planning work is ongoing.

The BHU CIT Coordinator has become an adjunct instructor at the DPSST basic police academy as an agency loan. He periodically assists with instruction in the areas of crisis intervention, ethics and professionalism.

2017 Q3 Update:

A 40-hour ECIT course was conducted from July 25 – 28, 2017. Of the 27 officers who volunteered for this training, twenty officers were selected and successfully graduated from the course. As a result, there are now 118 operational (in uniform assignments) ECIT members and a total of 135 active and sworn ECIT members.

BHU accepted the invitation to assist on a planning committee led by the Oregon Department of Public Safety Standards and Training (DPSST) to develop the CIT Northwest Regional Conference, which is scheduled for October 3-5, 2017. This work is ongoing.

The BHU CIT Coordinator has become an intermittent instructor at the DPSST basic police academy as an agency loan. However, he did not provide assistance during this quarter.

The BHU continues to collaborate with local law enforcement and social service partners to develop future crisis intervention and mental health response training along with information-sharing opportunities. Currently, BHU is in the planning stages for a two-hour mental health training for non-sworn members as well as an in-service for ECIT members.

2017 Q4 Update:

An ECIT Refresher course is planned for the first quarter of 2018.

2018 Q1 Update:

The BHU conducted a one day ECIT Refresher class for existing ECIT officers on five occasions--January 29th, and February 1st, 5th, 7th, and 9th—to accommodate the numbers. This training focused on:
- The use of COMTEK
- Helping People with Autism
- Juveniles in Crisis
- Stress and Resilience for Crisis Responders
- Updates to the Mental Health CAD question and the MH template
- System Changes and Challenges

2018 Q2 Update:

The BHU is finalizing the applicant list for the forty hour ECIT class scheduled for August 7th through 10th.

2018 Q3 Update:

Sixteen officers were certified during the specialized 40 hour training in August, 2018. As of the end of 2018 Q3, there are now
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130 operational ECIT PPB members with a total of 146 sworn ECIT PPB members.

At the June 27th BHUAC meeting, Officer Jim Steigmeier provided an overview of the planned curriculum for the August training and members provided feedback.

2018 Q4 Update:  No ECIT course was conducted this quarter.

2019 Q1 Update:  No ECIT course was conducted this quarter.

However, on March 12-13, two ECIT officers, not attached to BHU, completed sixteen hours of Behavioral Threat Assessment Training taught by Third Degree Communication.

2019 Q2 Update:  No ECIT course was conducted this quarter.

On June 10-11, 2019 five ECIT officers, attached to BHU, completed sixteen hours of Behavioral Threat Assessment Training presented at the Idaho Threat Assessment Conference.

2019 Q3 Update:  The BHU continued to develop the final lineup of instructors for the upcoming ECIT class, which includes local psychiatric professionals, mental health providers, family advocates and mental health consumers as well as BHU staff. This class is scheduled to be held in early November.

From August 13-16, 2019, one ECIT officer, two sergeants and a Lieutenant attached to BHU, attended the 2019 Threat Management Conference.

From August 26-28, 2019 the BHU Lieutenant, the SCT program manager, the SCT officer, and three BHRTs attended the 2019 CIT International Conference.

2019 Q4 Update:  Another 40-hour ECIT course was conducted from November 5 – 8, 2019. There were 20 officers who were certified during this training.

2020 Q1 Update:  An ECIT Refresher course was planned for the second and third quarter of 2020. However, due to the COVID-19 pandemic, this timeline may be subject to change.

On January 6-8, 2020, nineteen ECIT officers participated in Certified Crisis Intervention Specialist (CCIS) Training. The CCIS training consisted of three (3) days of classroom instruction, which includes academic modules and scenario based competency exercises, introduction to Crisis Intervention Continuum of Response, Language and Engagement procedures, meaningful content in self-awareness, anger management, readiness for duty and resilience, evidence-based best practices in de-escalation and practical knowledge in brain-body activity of the person in crisis.

In January 2020, BHU crime analyst, and two BHRT officer pairs attended an Association of Threat Assessment Professionals winter conference.

2020 Q2 Update:  During this quarter, the work of developing the agenda, curriculum, lesson plans and schedule of attendees for the refresher ECIT In-service was done. The sessions will commence next quarter.

2020 Q3 Update:  The BHU conducted a one day ECIT Refresher class for existing ECIT officers on ten occasions—August 18, 19, 20, 25, 26 and September 1, 2, 3, 21 and 22 to accommodate the numbers. This training focused on:
• Extreme Risk Protection Orders (ERPO)
• ECIT Data Points
• Suicide by Cop
• BHU Follow-up and SCT Program
• Involuntary Commitment Program: One System Component
• Strategic Communication for ECIT – Lecture and Skill Builder Exercises

Additional local training and conferences were offered to all ECIT officers as noted in the ECIT update handout. Attendance by
ECIT members is dependent on their RU scheduling and funding availability.

This quarter these trainings included:
• CNT Portland Police Bureau Crisis Negotiation Training (CNT) for those ECIT members on the CNT team.

2020 Q4 Update: No ECIT course was conducted this quarter.

• On December 07-11, 2020, two ECIT officers attended the Crisis Services Management Negotiation Level 1 Course.
• The BHU Lieutenant, a BHU sergeant, 3 BHRT Officers, the SCT officer, and an ECIT patrol officer attended the Bybee Lakes Hope Center Trauma Informed Care Class on October 13th.

2021 Q1 Update: The BHU Threat Sergeant attended the ATAP NW Chapter meeting on January 8th, 2021.

The BHU Lieutenant, SCT Program Coordinator, both BHU sergeants, the CIT Coordinator, the SCT Officer, the BHU Analyst, 3 BHU Officers, and the BHU Pass attended the OSHA Covid-19 Training on February 1st, 2021.

On the following dates the CIT Coordinator attended the CIT ECHO meeting put on by the Albuquerque Police Department and the UNM School of Medicine Department of Psychiatry and Behavioral Sciences:

• 1-19-2021 - Presentation by Nils Rosenbaum, MD on Psychosis
• 2-9-202 - Jaymes Fairfax Columbo on Therapeutic Jurisprudence
• 3-30-2021 - Presentation by Paul Romo, MD on Natural Vs. Meth Induced Manic States

On the following dates an ECIT Officer attended the CIT ECHO meeting put on by the Albuquerque Police Department and the UNM School of Medicine Department of Psychiatry and Behavioral Sciences:

• Perspectives on Psychosis - CIT Echo (January 19, 2021; 1.5 hours)
• Geriatric Population & Behavioral Health Disturbances in Dementia - CIT Echo (January 25, 2021; 1.5 hours)
• Therapeutic Jurisprudence - CIT Echo (February 9, 2021; 1.5 hours)
• Communicating with the Non-Responder - Crisis Systems Management (March 10, 2021; 2 hours)
• Natural vs. Meth Induced Manic States - CIT Echo (March 30, 2021; 1.5 hours)

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2021 Q3 Update:
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2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
## Guidelines for ECIT dispatch

**Task Description**
Guidelines for ECIT dispatch

**Task Requirements:**
C-I Team members will retain their normal duties until dispatched for use as a C-I Team. BOEC or PPB may dispatch C-I Team members to the scene of a crisis event.

*NOTE: PPB refers to "C-I Team" as "Enhanced Crisis Intervention Trained officers" (ECIT officers)*

**Status**
Complete - pending external review

**Action Steps:**
1. Establish roles and responsibilities for ECIT officers on crisis calls
2. Establish BOEC triage protocols related to ECIT calls
3. Train ECIT officers, resulting in the achievement of a skill identifier "EC" available for BOEC triage

**Task Date Completed:**
11/15/2013

**Evidence of Completion:**
1. BOEC Updated Dispatch Protocols
2. BOEC In-service Training
3. PPB Roll Call Information and Video: ECIT Dispatch Protocol-June 2013 (script provided, DVD available)
4. BHU PPB In-service Training

**Status Note:**
Protocol in place and utilized for dispatch of ECIT officers. Will respond, if available, to calls with mental health component and are violent; have a weapon; are at a known residential mental health facility; suicidal "jumper;" at request of responding officer; or at request of a citizen.

**2014 Q1 Update:**
ECIT officers dispatched to appropriate calls.

**2014 Q2 Update:**
BOEC continues to dispatch "EC" designated officers to mental health calls that meet the specified criteria.

**2014 Q3 Update:**
BHU staff members Sgt. McCormick, Officer Bruner-Dehnert and Analyst Silva taught 4 classes at BOEC In-service this quarter and will finish these In-service classes in January 2015. The staff reviewed the established ECIT Dispatch Criteria with BOEC personnel.

**2015 Q1 Update:**
BHU staff completed their participation in the BOEC annual in-service with the follow up training of dispatchers and call takers on January 15-16 that began in the Fall. Primary objectives of the training included:
- Understand Portland Police Bureau and BOEC’s responsibilities in response to the settlement agreement between the Department of Justice (DOJ) and City of Portland.
- Describe the organization and mission of the PPB Behavioral Health Unit (BHU)
- Dispatch Enhanced Crisis Intervention Team Officers to the appropriate mental health crisis calls.

The BOEC training provided an opportunity to receive feedback from dispatchers and call takers on BHU programs with the focus on how to better integrate BOEC with the BHU in resolving behavioral health crisis calls and gathering required performance measure data.

**2015 Q2 Update:**
BOEC continues to dispatch ECIT officers to mental health calls that meet the specified criteria. However, when working on the revision of the Bureau's mental health directives with COCL and DOJ and their respective experts this quarter, PPB agreed to expand the dispatch criteria for ECIT in its policy to include all suicide calls. That change will be implemented upon the enactment of the revised directives.

**2015 Q3 Update:**
BOEC continues to dispatch ECIT officers to mental health calls that meet the specified criteria or upon request of a citizen or officer. However, when working on the revision of the Bureau's mental health directives with COCL and DOJ and their respective experts this quarter, PPB agreed to expand the dispatch criteria for ECIT in its policy to include all suicide calls. That change will be implemented upon the enactment of the revised directives.

**2015 Q4 Update:**
BOEC continues to dispatch ECIT officers to mental health calls that meet the specified criteria including upon request of a citizen or officer. However, when working on the revision of the Bureau's mental health directives with COCL and DOJ and their...
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respective experts this quarter. PPB agreed to expand the dispatch criteria for ECIT in its policy to include calls where the person is attempting suicide. That change will be implemented upon the enactment of the revised directives.

2016 Q1 Update: Bureau of Emergency Communications (BOEC) Policies and Procedures covering mental health crisis calls and ECIT dispatch criteria were reviewed and approved by the Behavioral Health Advisory Committee (BHUC) this quarter. The BHUC provided recommendations to further clarify the requirement to dispatch ECIT on specified crisis calls.

2016 Q2 Update: As part of the final revision of PPB Directive 850.20, Police Response to Mental Health Crisis, ECIT dispatch protocols were updated to include the following:

ECIT members will respond as the primary member on a mental health crisis call involving the following:
- Upon request of a citizen,
- Upon request of the responding member,
- The subject is violent,
- The subject has a weapon,
- The subject is threatening or attempting suicide, or
- The call is at a residential mental health facility.

This update was discussed at the ECIT Advisory Council meeting and covered at ECIT in-service training.

2016 Q3 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with the protocol contained in the finalized version of PPB Directive 850.20.

During PPB's 2016 in-service training that commenced in September, the BHU Sergeant will take the lead on the training regarding the newly updated Directive 850.20, Police Response to Mental Health Crisis. This includes a discussion on dispatch protocols for ECIT members.

ECIT dispatch protocols were also discussed with members attending the July ECIT in-service training.

2016 Q4 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with the final revision of PPB Directive 850.20.

2017 Q1 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with the final revision of PPB Directive 850.20. This was discussed at the ECIT Advisory Council meeting on February 15, 2017 with no issues of concern noted pertaining to the protocols and process.

During Quarters 1 and 2 of 2017, PPB is conducting annual in-service training for all PPB members, which includes a two-hour class on scaled crisis response and features ECIT response procedures per PPB Directive 820.50.

2017 Q2 Update: BOEC dispatches ECIT members to mental health calls in accordance with the final revision of PPB Directive 850.20. In eight 2 ½ hour sessions this quarter, ECIT officers participated as instructors in BOEC in-service training. Each session offered two classes: one on ECIT officer perspectives that featured a question-and-answer format and facilitated conversations, and the other provided scenario exercises for the participating dispatchers.

During this quarter, PPB continued its annual in-service training for all PPB members, which included a two-hour class on scaled crisis response and features ECIT response procedures per PPB Directive 820.50.

2017 Q3 Update: As far as PPB is aware, BOEC continues to dispatch ECIT members to mental health calls in accordance with the protocol contained in the final revision of PPB Directive 850.20.

In a 2 1/2 hour session this quarter, ECIT officers participated as instructors in BOEC training. The session offered two classes: one on ECIT officer perspectives that featured a question-and-answer format and facilitated conversations; and the other provided scenario exercises for the participating call-takers.

2017 Q4 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with the final revision of PPB Directive 850.20.
Beginning in this quarter, BHU began conducting an extensive review of ECIT responses to the different types of mental health facilities in Portland. After consultation with affected community partners, BHU will update response notifications for ECIT members to accurately reflect PPB Directive requirements.

2018 Q1 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with the final revision of PPB Directive 850.20.

2018 Q2 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol that took effect on April 1st.

2018 Q3 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

2018 Q4 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

During this quarter, PPB and BOEC conducted an analysis of six months of data (04/01/18-09/30/18) to look at ECIT response levels after the additional criterion went into place. The results of this assessment will be reported in 2019 Q1.

2019 Q1 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

2019 Q2 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

2019 Q3 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

Also during this quarter, PPB placed the BOEC dispatch protocol on its internal intranet for officer ready access.

2019 Q4 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

In addition, the BOEC dispatch protocol is now a permanent fixture on PPB’s internal intranet for officer ready access.

2020 Q1 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

In addition, the BOEC dispatch protocol is now a permanent fixture on PPB’s internal intranet for officers’ ready access.

Also, the BHU sent an email to ECIT officers to reiterate that the call type is ‘ECIT’ before the call is completed if they were dispatched as an ECIT officer. This includes if they were dispatched as an ECIT officer but never arrived on scene or on scene officers were advising on the ECIT call. If the call type needs to be changed, officers are instructed to ask the dispatcher by voice or message. BHU wanted to stress the importance of capturing every instance when the BOEC ECIT dispatch protocol was "enacted" to quantify the work ECIT officers are doing.

2020 Q2 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

In addition, the BOEC dispatch protocol is now a permanent fixture on PPB’s internal intranet for officers' ready access.

2020 Q3 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

In addition, the BOEC dispatch protocol is now a permanent fixture on PPB’s internal intranet for officers' ready access.

2020 Q4 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

In addition, the BOEC dispatch protocol is now a permanent fixture on PPB’s internal intranet for officers' ready access.

2021 Q1 Update: BOEC continues to dispatch ECIT members to mental health calls in accordance with its revised protocol.

In addition, the BOEC dispatch protocol is now a permanent fixture on PPB’s internal intranet for officers' ready access.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:
Task Description
Highlight the work of the ECIT

Task Requirements: PPB will highlight the work of the C-I Team to increase awareness of the effectiveness of its work.

*NOTE: PPB refers to "C-I Team" as "Enhanced Crisis Intervention Trained officers" (ECIT officers)

Status Actively in Process

Action Steps:
1. BHU will establish a BHU website
2. BHU will establish a monthly newsletter
3. BHU will increase awareness of the effectiveness of its work, through various communication mediums that will highlight the efforts of the BHU and the positive work of MCU, ECIT, SCT and the BHU’s partners

Evidence of Completion:
1. BHU Community Outreach, Training events and Conference participation
2. BHU Newsletters
3. BHU Community Resource Guide
4. BHU website (online)
5. ECIT Roll Call flyer
6. ECIT/MCU Commendation letters
7. Example materials from Adult Mental Health System Advisory Council
8. Example materials from Children’s Mental Health System Advisory Council

Task Date Completed: ☐ Received DOJ Approval? Approval

Status Note: Friday, May 7, 2021

2014 Q1 Update: BHU issued newsletters for the months of January, February and March, each of which contained a story of ECIT’s work with a person in mental health crisis.

2014 Q2 Update: BHU newsletters which discuss the work of ECIT were distributed for April, May and June. In addition, PPB's PIO sent out press releases highlighting some of the incidents involving ECIT officers who were instrumental in avoiding a bad outcome for a person in a behavioral health crisis.

2014 Q3 Update: BHU produced its newsletter for the months of July, August and September. Members also engaged in a number of outreach activities in the quarter to educate the various parties about BHU and ECIT.

2014 Q4 Update: The BHU published newsletters for the months of October and November which related cases where ECIT officers were utilized in crisis situations. These newsletters are posted on the PPB's website as well as sent electronically to various internal and external stakeholders and partners.

Also, various staff of BHU facilitated, attended, or trained at 16 different programs including a consumer/citizen’s forum sponsored by Disability Rights Oregon at the Bud Clark Commons.

Further, the BHU was featured in an article in the Lund Report which described how the PPB has set up this special behavioral health unit, training officers on how to handle such calls and working with mental health providers and CCOs to observe officers in action.

2015 Q1 Update: The BHU continues to take advantage of opportunities to conduct community engagement presentations in order to introduce the BHU, BHRT, ECIT and SCT programs. During the 1st quarter, the BHU conducted community engagement presentations for the following organizations:
• William Temple House (Mental Health Counseling Services)
• Mercy Corps (Re-integration and Transition Program)
• Multnomah County Domestic Violence shelter coordinators
• PPB Community Academy
• Lines for Life (Always Hope annual fundraiser)
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• Folktime (annual breakfast)
• SW Neighborhood Public Safety meeting

Presentations are catered to the specific requests of the organization and augmented with informational brochures developed by the BHU. The BHU uses two brochures, one is an overview of the BHU and the other was developed in conjunction with NAMI titled “Working with Emergency Responders” that educates individuals on what to expect from emergency responders when someone is in behavioral crisis. The BHU also provides Mental Health Resource cards and access to a comprehensive behavioral health community resource guide through the PPB BHU website.

The BHU has representatives attending numerous behavioral health community service coordination monthly/quarterly meetings in order to foster integration with the behavioral health community and to increase awareness of the effectiveness of the BHU programs.

The BHU also continues to receive positive publicity through news articles, PIO releases and internal SITREPS highlighting the success of the ECIT program.

2015 Q2 Update: During the 2nd quarter, the BHU conducted community engagement presentations for the following organizations:
• Mental Illness & Crisis Communication Training for City of Portland Park Rangers on April 8
• FBI Citizen Academy Alumni group on April 16
• Central Lutheran Church Staff Crisis Response Training on April 29
• Special Olympics Breakfast with Champions on April 29
• NAMI Luncheon on April 8
• BHU team support to the NAMI Walk on May 17
• PPB Citizens Academy for the Community Oversight Advisory Board (COAB) on June 29

Presentations are catered to the specific requests of the organization and augmented with informational brochures developed by the BHU. The BHU uses two brochures, one is an overview of the BHU and the other was developed in conjunction with NAMI titled “Working with Emergency Responders” that educates individuals on what to expect from emergency responders when someone is in behavioral crisis. The BHU also provides Mental Health Resource cards and access to a comprehensive behavioral health community resource guide through the PPB BHU website.

During the quarter the BHU has participated in the planning for the Northwest Regional CIT Conference to be held in September 2015 in Vancouver, Washington. The BHU will present as well participate in all conference events to collaborate with local CIT programs within the region.

The BHU continues to provide representatives at the following community service coordination monthly/quarterly meetings in order to foster integration with the behavioral health community and to increase awareness of the effectiveness of the BHU programs:
• Adult Mental Health and Substance Abuse Advisory Council (AMHSAC)
• Children’s Mental Health System Advisory Council (CMHSAC)
• Local Public Safety Coordinating Council (LPSCC) for Multnomah County
• Metropolitan Acute Care Advisory Committee (MACAC)
• Metro EASA Advisory Council (MEAC)
• Homeless Youth Oversight Committee (HYOC)
• Developmental Disability Advisory Committee (DDAC)
• Downtown Public Safety Action Committee (DPSAC)
• Cascadia-Legacy Emanuel Coordination Meeting

ECIT members continue to receive positive publicity through news articles, PIO releases and internal Crisis Situation Reps (CSRs)(included in supporting documents) highlighting the activities and successes of the ECIT crisis response. CSRs are a collection of the significant events that are related to a possible mental or behavioral crisis.

Several outside law enforcement/mental health agencies contacted the BHU this quarter seeking more information on the Behavioral Health Unit. Representatives from the following locations conducted site visits with the BHU:

Friday, May 7, 2021
BHU just published its quarterly newsletter at the beginning of July which highlighted events that took place in the second quarter.

2015 Q3 Update: During the third quarter, the BHU continued to take advantage of opportunities to conduct presentations or engage with the community to champion the work of BHU, BHRT, ECIT and SCT. Those included:

- BHU officers acting as training partners for COAB members who attended the PPB Citizen Academy in July.
- BHU staff participating in the Multnomah County Law Enforcement Torch Run for Special Olympics to raise funds and awareness for Special Olympics athletes in July.
- BHU officers participating in the Special Olympics Oregon State Summer Games in July.
- BHU conducting a presentation at the Portland English Language Academy in July.
- BHU members and select ECIT officers participating in Camp Rosenbaum, a summer camp for low-income, at-risk youth in July.
- BHU presenting at CODA/Queen’s University event in August.
- BHU hosting Milwaukie, WI police department in August to discuss PPB’s crisis response model and provide an overview of the BHU.
- BHU providing NYPD information on the Behavioral Health Unit.
- BHU presenting at the Homeless Alcohol and Drug Intervention Network/HADIN in September.
- BHU presenting during the FBI Campus Safety Conference in September.

Further, the BHU was invited to present at the Mental Health/1st Responder Conference in Spokane, Washington in July 2015. The BHU presented during two different sessions, a BHU overview and an executive briefing on considerations when starting a Behavioral Health Unit. BHU members were also invited to attend other conference breakout sessions and had the opportunity to conduct regional networking.

In addition, the BHU presented an overview of its work during two different sessions at the Northwest Regional CIT Conference in Vancouver, Washington in September. All members of the BHU attended and BHU hosted a display booth throughout the conference to share information with conference attendees. One BHU member, Clinician Cindy Hackett, was nominated by her partner, Officer Josh Silverman, and selected as the NW Regional Mental Health Practitioner of the Year. The BHUAC chair, Shannon Pullen, was nominated by LT Tashia Hager and selected as the NW Regional Community Partner of the Year.

On September 28, the BHU submitted a proposal to present a workshop entitled “Expanding a Crisis Intervention program into a multi-layered response” at the 2016 International CIT Conference in order to share information on the Behavioral Health Unit and PPB crisis response model.

ECIT members continue to receive positive publicity through news articles, PIO releases and internal Crisis Situation Reps (CSRs) highlighting the activities and successes of the ECIT crisis response.

BHU just published its quarterly newsletter at the beginning of October that highlighted events that took place in the third quarter.

2015 Q4 Update: The BHU participated in 24 community outreach and training presentations this quarter. Highlights included:

- Invite to participate in a NAMI “evening with experts” and presented BHU panel discussion.
- Presented a BHU program overview and discussion on crisis response to several agencies that routinely interact with people with mental illness including:
  - Multnomah County librarians
  - Mercy Corps transitions center
  - Transitions Projects Inc (TPI)
  - Portland Patrol Inc/Clean & Safe
  - Rose Haven Resource Fair
  - Allied Health Staff
  - OHSU Intercultural Psychiatric Program
- The BHU was invited to present the PPB Crisis Response model to major community groups that included:
  - Community Psychiatrist Group sponsored by the OHSU Psychiatry Department
  - Leadership Portland Mental Health Panel
  - Community Oversight and Advisory Board (COAB)
On December 9, 2015 the BHU assisted Family Services Division in sponsoring the first “Toys & Joy” event to further develop the relationship between police and persons with an intellectual or developmental disability.

Assisted with the PPB Citizen Academy for the PPB Training Advisory Committee (TAC) members.

On November 5, 2015, the BHU, including current ECIT members, were awarded a PPB Unit Commendation for their accomplishments over the last several years. This award was formally presented at the PPB Awards Ceremony open to the community.

ECIT officers continue to employ their skills to assist people in crisis as evidenced by multiple incidents of suicidal subjects safely being taken to receive medical attention. This work was highlighted in PPB news releases, the most noteworthy being “Portland Police Address Numerous Suicidal Subject Calls.”

2016 Q1 Update:

During the quarter, the BHU continued to take advantage of opportunities to conduct presentations or engage with the community to champion the work of BHU, BHRT, ECIT and SCT. It participated in over 45 outreach events. Listed below are highlights of this quarter:

- The BHU conducted mental health awareness and crisis response training for a variety of agencies including the William-Temple House, US Post Office, and the Portland Bureau of Transportation.
- The BHU was invited to present at two conferences this quarter, the Oregon Psychiatric Physicians Association Public Safety/Mental Health Collaboration Conference and the Association of Threat Assessment Professionals quarterly conference.
- The BHU conducted program overview presentations for representatives of several academic organizations that included University of Portland, Portland State University, Portland English Language Academy, Iowa State University and the Senior Studies Institute.
- The BHU attended supportive events for our community partners which included a pizza party at Northstar Clubhouse, Lines for Life Gala, Special Olympics Polar Plunge, Folktime Annual Breakfast, and the NAMI Walk kickoff luncheon.
- The BHU Sereant presented information on the BHU to new BOEC dispatchers.
- The CIT Coordinator worked with Arbor Place Secure Residential Treatment Facility and a Morrison Child and Family Services representative to discuss a collaborative effort in improving police response to their facilities.
- The SCT Program manaer engaged with Transition Projects Inc, US Probation Community Resource specialist, Central City Concern, Portland Rescue Mission, and the Multnomah County Defenders Office to develop further partnerships.
- The CIT Coordinator and PPB Training Division representative presented an overview of PPB’s crisis intervention training program to the COAB Mental Health Sub-Committee.
- BHU members conducted outreach in the public schools through the GREAT and Safety Zone programs.

In addition to the highlighted outreach events, the BHU hosted other law enforcement agencies and provided information to others interested in the PPB’s crisis response model and Behavioral Health Unit. The BHU Lieutenant partnered with a Cascadia Behavioral Health representative to present on collaboration between the mental health system and law enforcement at the Smart Policing Initiative Conference hosted by Portland Police Bureau. There were attendees from more than 10 law enforcement agencies across the nation. The BHU hosted representatives from Lakewood, Washington Police Department seeking information on developing a mental health response team. The BHU also spoke to representatives from Bellingham, Washington and Edmund, Oklahoma law enforcement agencies seeking information on establishing a mental health unit. Shoreline PD, who previously visited the BHU, hosted the BHU analyst to receive more information on establishing a mental health unit.

The BHU was contacted by Dr. Landy F. Sparr, Director of OHSU Forensic Psychiatry Training Program, requesting to sponsor the BHU in submitting an application to present the BHU program at the upcoming American Academy of Psychiatry and the Law (AAPL) conference in the Fall of 2016. Dr. Sparr attended a BHU presentation at OHSU and believes other Forensic Psychiatrists
would be interested in Portland’s crisis response model.

The BHU provided a program overview to the Oregon Department of Public Safety Standards and Training (DPSST) CIT Coordinator. This meeting led to the two collaborating on the BHU’s review of DPSST’s mental health training curriculum, assisting in the hiring process for a mental health clinician for the state CIT program, and agreeing to partner in future training opportunities.

The BHU published the quarterly newsletter highlighting the new ECIT members, current ECIT officer’s successes, and BHU programs.

2016 Q2 Update: During this quarter, the BHU received positive national attention through a NY Times article by Erica Goode published April 25, 2016 titled “For Police, a Playbook for Conflicts Involving Mental Illness.”

The BHU was also positively referenced during Deputy Attorney General Sally Yates’ speech at the Stepping Up: National Summit on April 19, 2016 and in Deputy Attorney General Vanita Gupta’s speech during the CIT International Conference on April 22, 2016.

The BHU participated in more than twenty (20) community outreach and training events. Highlights of this quarter included;

- The BHU presented the PPB Crisis Response Model and BHU program at the 2016 CIT International Conference in Chicago, IL. BHU members were also able to attend the conference to network and gain information on ideas to further expand our program.

- In April 2016, the BHU assisted in providing safety training to Cascadia Project Respond mental health crisis workers. Project Respond clinicians accompany police on crisis calls and this training provides further collaboration between PPB and mental health crisis responders.

- In April 2016, the BHU also presented at the Guardian/Conservator Association of Oregon annual conference, discussing police response to persons in crisis.

- In May 2016, participated with the PPB team in the NAMI Walks Northwest to raise awareness for NAMI and build community relationships.

- The BHU continued to expand our resources for veterans by meeting and collaborating with the Portland Vet Center Staff and the Veteran’s For Peace

- The BHU met with staff and assisted in coordinating police response at Columbia Care Powell Butte and Arbor Place residential mental health facilities.

- BHU members continued to conduct outreach to vulnerable populations within the community including a presentations at the Portland English Language Academy, Safety Zone instruction, and assisting with Special Olympics Oregon.

- The Service Coordination Team conducted outreach with DePaul Treatment Center, Central City Concern, Outside In, and the Oregon Judicial Department and hosted a formal graduation ceremony at City Hall this quarter.

The BHU collaborated with the Department of Public Safety Standards and Training (DPSST) CIT Coordinator and Bureau of Emergency Communications (BOEC) training manager to assist in the development of a BOEC CIT course for dispatchers.

In June, the CIT Coordinator attended the Oregon DPSST Basic Police Academy mental health response training and observed the mental health response scenarios. The CIT Coordinator continues to work with the state CIT Coordinator in developing curriculum
and ensuring PPB’s CIT curriculum is complimentary and expanding on the Basic Police Academy training.

In order to further share information and collaborate with local law enforcement agencies, the BHU submitted a program overview on the Oregon Knowledge Bank website. The BHU also provided program information to the DPSST CIT Coordinator to use in assisting other agencies developing CIT programs in Oregon.

In June 2016, ECIT Officer Jason Jones was awarded the Nathan Thomas Distinguished Service Medal honoring his commitment to improving police response to persons in crisis.

The BHU Newsletter was published in April 2016 highlighting the visit by US Attorney General Loretta Lynch, outreach with Northstar, the Mental Health & Public Safety Collaboration Conference and the positive work ECIT officers are doing in the community.

This quarter the BHU updated the Mental Health Community Resource guide and posted it on the BHU external website and the PPB intranet for community members and officers to obtain information on local resources.

The BHU Newsletter was published highlighting the BHU’s presentation at the CIT International Conference in Chicago, ECIT Officer Jones receiving the Nathan Thomas Award, the recent SCT graduation ceremony and the good work ECIT officers are doing on crisis calls.

Friday, May 7, 2021
The BHU participated in 32 community outreach and training presentations during the 4th quarter. Highlights included:
- Participation in the “Out of Darkness” walk for suicide prevention on October 1.
- Presentations and discussion on BHU programming and crisis response to influential community organizations that interact with people with mental illness
  - Portland English Language Academy
  - Adult Protective Services
  - Community Academy
  - Local suicide prevention advocate Sara Hobbs
  - American Academy of Psychiatry (AAPL) Conference
  - Portland English Language Academy
- On November 20, the BHU assisted Family Services Division in sponsoring the second “Holiday Toy and Food Drive” event to further develop the relationship between police and persons with intellectual or developmental disabilities.
- On October 22, the BHU participated in a Tip-A-Cop fundraiser for Special Olympics Oregon.
- On November 27, the CIT Coordinator was recognized as a Blazers Hometown Hero at a professional basketball game for his work as an ECIT member and in the houseless community.
- On November 30 and December 1, the CIT Coordinator presented at the Oregon Problem-Oriented Policing conference on the topic of developing successful community partnerships in working with the houseless community.

ECIT officers continue to use their skills to assist people in crisis as displayed in multiple incidents that were successfully de-escalated and resolved. This work continued to be highlighted in PPB news releases.

The BHU participated in 21 community outreach and training presentations during this quarter. Highlighted events include:
- On January 16, 2017, three BHU members participated in the PPB-sponsored community academy for the actors in the Hands Up Don't Shoot Monologues.
- On January 23, 2017, the CIT Coordinator presented for 2 hours at Lewis and Clark Law School on the topic of police-related crisis response.
- On February 15, 2017, the CIT Coordinator conducted a multi-agency site review of Cascadian Terrace, a facility which generates frequent police calls-for-service, including a recent shooting.
- On February 27, 2017, two BHU members delivered a one hour presentation at the two day State of Oregon Civil Commitment training on the topics of BHU / ECIT crisis response.
- Twice in March, BHU delivered a three-hour presentation on police-community crisis intervention to two respective community partner agencies.
- During this quarter, BHU assisted four law enforcement agencies in their quests to learn more about BHU, ECIT, community collaboration efforts and crisis response strategies. Also, BHU members participated in six community meetings to discuss PPB-related, crisis response work.

ECIT officers continue to use their skills to assist people in crisis as displayed in multiple incidents that were successfully de-escalated and resolved. This work continues to be highlighted in PPB news releases and stories.

The BHU participated in 45 community outreach and training presentations during this quarter. Highlighted events include:
- On April 6, 2017, the CIT Coordinator participated in a Coffee with a Cop event at Cascadian Terrace, a public housing venue which includes persons with mental illness.
- On April 25, 2017, the CIT Coordinator provided police response training for Friendly House, a mental health and social services provider.
- On April 28, 2017 the BHU Lieutenant and Service Coordination Team Manager met with Multnomah County staff to identify strategies to improve access and impact to vulnerable populations.
- On April 30, 2017, the CIT Coordinator joined other members of the PPB and community at large for the annual Autism Walk.
- On May 3, 2017, the CIT Coordinator provided police response and crisis training for Powell’s Books and Portland Patrol, Inc. respectively.
- On May 5, 2017, the BHU Lieutenant delivered a presentation for Parks Bureau on the police and crisis response.
On May 22 – 23, 2017, the BHU Lieutenant and Dr. Liesbeth Gerritsen delivered a presentation to psychiatrists on crisis responses by police at the APA Conference in San Diego, CA.

During this quarter, BHU assisted two law enforcement agencies who initiated requests to learn more about BHU, ECIT, community collaboration efforts and crisis responses strategies.

During the first quarter, BHU began tracking data on calls-for-service at PPB-identified mental health facilities. During this quarter, a procedure was developed to address facilities that may be identified as having an over-reliance on police services. This procedure is outlined in the memo “Procedures: Facilities” created by the BHU Lt. and sent to the BHU staff.

The CIT Coordinator provided clarification and training to three identified facilities in an attempt to educate staff on proper utilization of police resources and police response expectations with the goal of reducing police calls-for-service and improving outcomes for persons in crisis.

The CIT Coordinator provided clarification and training to three identified facilities in an attempt to educate staff on proper utilization of police resources and police response expectations with the goal of reducing police calls-for-service and improving outcomes for persons in crisis.

ECIT officers continue to use their skills to assist people in crisis as displayed in multiple incidents that were successfully de-escalated and resolved. This work continues to be highlighted in PPB news releases and stories.

2017 Q3 Update:
The BHU participated in 11 community outreach and training presentations during this quarter. Highlighted events include:

- August 1, 2017, the BHU Service Coordinator Team Manager attended National Night Out.
- From August 3 – 5, 2017, the CIT Coordinator attended the American Psychological Association (APA) 125th Annual Convention and participated in three presentations with psychologists: 1) “Conversation with a Cop;” 2) “Threat and Compassion: Entering World of the Police Patrol Officer;” and 3) “Crisis and Conflict: How Police Patrol Officers Respond.”
- From August 16 – 18, 2017, the BHU Lieutenant and the CIT Coordinator attended the CIT International Conference and presented on the following topic: “The multi-layered response to persons in crisis.”
- On August 23, 2017, the CIT Coordinator participated in “Shop with a Cop” to provide school clothing to underprivileged children.
- On September 13, 2017, the BHU Service Coordinator Team Manager and officer, the BHU Lieutenant and the CIT Coordinator attended the Central City Concern Client Appreciation barbeque, honoring program participants who struggle with behavioral health issues and addiction.
- On September 20, 2017, the CIT Coordinator participated in a “Coffee with a Cop” event focusing on behavioral health and homelessness issues.
- During this quarter BHU facilitated a tour of the Training Division for a law enforcement-affiliated psychologist who had participated in a BHU presentation. The psychologist expressed an interest in PPB’s utilization of scenario-based training.

BHU also provided two law enforcement agencies with information about BHU programs and processes.

ECIT officers continue to use their skills to assist people in crisis as displayed in multiple incidents that were successfully de-escalated and resolved. This work continues to be highlighted in situation reports (SitReps), PPB news releases and stories.

2017 Q4 Update:
The BHU participated in 16 community outreach and training presentations during this quarter. Highlighted events include:

- From October 3 – 5, 2017, members of BHU attended the NW Regional CIT Conference, and the CIT Coordinator presented on the topic of “Policing Smarter with Local Resources.”
- On October 7, 2017, several BHU members participated in the American Suicide Prevention Foundation Out of the Darkness Walk.
- On October 20, 2017, the Service Coordination Team (SCT) Manager delivered a presentation at the Community Peace Collaborative Public Forum.
- On October 23, 2017, The CIT Coordinator delivered a presentation for students at PSU about BHU and community policing.
- On October 24, 2017, the CIT Coordinator and a BHU Clinician delivered a presentation for the Old Town / China Town Neighborhood Association on de-escalation and police response to persons in crisis.
- From October 25 – 26, 2017, the CIT Coordinator instructed for DPSST, assisting with crisis intervention scenario training.
- From November 2 – 4, 2017, the CIT Coordinator participated in a presentation as part of a panel on “Reducing Behavioral Health Inequities in Criminal Justice” at the University of Chicago conference “Tools and Tactics: Promising Solutions to Advance the Era of Smart Decarceration.”
- On November 8, 2017, a BHRT Officer and a BHU Clinician delivered a presentation for the Downtown Retail on de-escalation
and police response to persons in crisis.

• On November 15, 2017, the SCT Manager met with the Lake Oswego Police Chief and Captain to explain the Service Coordinator Team program.
• On November 15, 2017, the CIT Coordinator delivered a presentation as part of a panel at Concordia University’s conference on “Building Community Resilience”.
• On November 16, 2017, the SCT Manager delivered a presentation on the Service Coordination Team program to Lifeworks NW, a local treatment provider.
• On November 19, 2017, the CIT Coordinator delivered a presentation on BHU and ECIT at the ISPS-US Annual Conference.
• On November 21, 2017, the SCT Manager delivered a presentation on the Service Coordination Team program to the Old Town Business.
• On November 29, 2017, the CIT Coordinator instructed for DPSST, assisting with crisis intervention scenario training.
• On December 6, 2017, the CIT Coordinator presented at the Oregon Problem Oriented Policing Conference on the topic of “Policing Smarter with Local Resources.”

On December 13, 2017, the CIT Coordinator instructed for DPSST, presenting on History of Policing instruction.
• On December 20, 2017, the CIT Coordinator instructed for DPSST, presenting on Ethics.

ECIT officers continue to use their skills to assist people in crisis as displayed in multiple incidents that were successfully de-escalated and resolved. This work continues to be highlighted in situation reports (SitReps), PPB news releases and stories.

2018 Q1 Update: On January 1st, an ECIT officer led a team of patrol officers in responding to a man who was shooting arrows into the wall inside his apartment. He was safely taken into custody and transferred to Unity.

On January 3rd, ECIT officers negotiated in a tense stand-off situation with a man armed with a weapon that lasted over an hour. The situation ultimately ended in a safe outcome and the man was taken to Unity.

On January 28th, two ECIT officers negotiated with a suicidal woman on the Glisan overpass of I-205 for almost an hour. She was ultimately talked back and was taken to Unity.

On January 29th, Clackamas County Sheriff’s Office requested a PPB ECIT response for a man threatening to jump off a six story parking facility. The officers were able to talk the man to safety and he was taken on a POH.

On February 1st, Sergeant Hettman and Officer Bryson from the BHU attended a Crisis Services Panel Discussion hosted by the Multnomah County Mental Health & Addiction Services Division. Sergeant Hettman and Officer Bryson discussed the work of the Portland Police Bureau, and more specifically, the Behavioral Health Unit and how it fits into the wider system of crisis services. The discussion was attended by a large group of residential providers. Other service partners present were: Multnomah County Crises Services, Unity Center and Project Respond.

On February 3rd, ECIT officers negotiated with a man in crisis at a downtown Target store. After speaking with him for some time, he was eventually placed on a POH and transported to the hospital.

On February 7th, an ECIT officer led negotiations that led to the safe outcome of a suicidal man who had overdosed on pills.

On February 16th, an ECIT officer responded to a man threatening suicide on an I-5 overpass. After an hour and fifteen minutes of negotiation he agreed to a transport to Unity.

On February 16th, an ECIT officer conducted negotiations with a distraught man threatening suicide and homicide of his three year old son. The negotiation ended peacefully with no injury to the man or his child.
On March 5, an ECIT officer made contact with a suicidal eleven year old threatening to jump from an overpass. The officer successfully negotiated the boy to a position of safety and he was transported to the hospital.

On March 16, Officer Hansen and Cindy Hackett gave a presentation regarding the Portland Police Bureau’s Behavioral Health Unit to a NASRO (National Association of School Resource Officers) conference hosted by the Portland Police Bureau’s Youth Services Division (YSD). The presentation discussed the Bureau’s scaled crisis response model, BHRT activities and the BHU as a whole.

On March 19th, an ECIT officer responded to a suicidal female threatening to jump from the Hawthorne Bridge. He was able to successful talk her back and she was taken to Unity.

On March 23rd, a BHU Sergeant, Officers and clinicians spoke with residents, members and staff of the Maybelle Center for Community about BHU and other timely topics of interest. The event was titled “Cops & Donuts.” The event was held in the Maybelle Center’s community space. Members from BHU had meaningful dialog around police and first responder interactions with subjects with mental illness.

2018 Q2 Update: PPB continued to share examples of the work of ECIT officers both internally and externally through its social media such as:

On April 7th, ECIT officers responded to a man experiencing a mental health crisis running through all lanes of traffic on I-205 at SE Stark Street. He was safely transported to a local hospital.

On April 8th, officers responded to a man with an AR-15 and a pistol who was a recent subject of a BHU flyer. On arrival officers found him to be armed with a sword, knives and sticks. ECIT officers assisted SERT and CNT with taking him safely into custody.

On May 2nd, ECIT officers assisted CNT in taking a barricaded man into custody from a local hotel who was experiencing a mental health crisis. He was taken to Unity on a Police Officer’s Hold.

On May 14th, officers spoke to a man threatening suicide from the top of a downtown parking garage. After continuing for over an hour, he was safely taken to Unity on a Police Officer’s Hold.

On May 17th, ECIT officers responded to a man threatening suicide with a razor blade on the Burnside Bridge. After communicating with him for 30 minutes they were able to take him into custody and transport him to a hospital on a Police Officer’s Hold.

ECIT and BHU personnel responded to a man barricaded in a downtown retail bike shop. After more than an hour, he was talked out and transported to a local hospital.

On June 6, an ECTT officer assisted another officer in speaking with a man who had sliced his wrists and was threatening jump off a highway overpass. Eventually the subject agreed to climb back over and was transported to a local hospital.

On June 9th, ECIT officers assisted with a man destroying property and threatening with a pipe. On arrival, they noted he was bleeding heavily from the head. After more than two hours of talking, he was taken to the hospital on a Police Officer’s Hold.

On June 12, an ECIT officer assisted with a man threatening suicide from jumping from the Freemont Bridge. After a long period of negotiation, he agreed to step back and was transported to a local hospital.

BHU staff also continued to participate in outreach and training presentations on the work of the Unit:

On April 10th and 11th, BHU staff hosted members of the Ventura (CA) Police Department to provide training and insight into our current mental health response model.
On April 12th, BHU staff, along with Multnomah County Mental Health partners, provided de-escalation and communication training to staff at JAMA Software in Portland.

On April 18th and 25th, BHU staff assisted PPB Training staff in hosting a Citizen’s Academy which included members of the Portland Citizen Review Committee.

On May 9th, BHU staff participated in the Student Law Project at Portland State University and presented to groups of high school attendees on Challenges in Police Mental Health Response.

On May 16th, BHU staff presented on de-escalation and communication techniques to staff at the Multnomah County District Attorney’s Office.

On May 29th, BHU staff participated in a Panel of Mental Health Providers hosting a Q&A session for a variety of community guests.

Also on May 29th, BHU staff presented on de-escalation and communication techniques to the security staff at the Moda Center and Veterans’ Memorial Coliseum.

On June 7th, BHU staff, along with Multnomah County Mental Health partners provided de-escalation and communication to a group of downtown stakeholders hosted by the Portland Business Alliance.

On June 20th, BHU staff presented on de-escalation and communication techniques to staff at the Portland Bureau of Parks for their Park Ranger training.

On June 27th, BHU staff met with management of Vos Day Labor to address questions regarding their relation and communication to the local houseless community.

**2018 Q3 Update:** PPB continued to share examples of the work of ECIT officers both internally and externally through its social media such as:

On July 1, an ECIT officer verbally engaged a man doused in lighter fluid and threatening to immolate himself. After 25 minutes, the man voluntarily walked to a waiting ambulance and was transported to a hospital on a Police Hold.

On July 8, an ECIT officer arrived on a call to assist officers who were confronting a woman in the street holding a knife to her throat. The woman had engaged in similar behavior two days before on the east side of Portland. After speaking with the officer for several minutes, she agreed to drop the knife and was safely transported to the hospital.

Also on July 8, officers, including an ECIT officer, responded to the Burnside Bridge and engaged a female sitting on the south side of the bridge threatening suicide. After about 20 minutes of conversation, she voluntarily walked to an ambulance and was transported to a hospital for evaluation.

On July 13, officers responded to a man looking suicidal on the Hawthorne Bridge. When officers first arrived, the man displayed a hostile demeanor and charged the officers. He then ran back to the rail and threatened to jump. An ECIT officer arrived and they were able to engage in conversation. After about an hour he agreed to step away from the railing and was transported to Unity Center.

On July 19, ECIT officers responded to a depressed and suicidal woman on the Salmon Street overpass of I-405. The woman had not received housing that she had expected and was threatening to jump. Officers, after a long conversation, convinced her to come back over the railing and she was transported to Unity Center.

On July 20, officers responded to the Vista Bridge on a man outside the anti-suicide fencing threatening to jump. On-scene was an
ECIT officer who assisted officers in talking to the man for over 35 minutes. Finally the officers convinced the man back off the ledge and through the fencing. He was placed on a hold and transported to a local hospital.

On July 25, officers responded to a woman on the west end of the Burnside Bridge with one leg over the edge, threatening to jump. An ECIT officer responded to her and, after agreeing to stop at a local women’s shelter first to retrieve her property, was able to talk her away from the edge. She was eventually transported to a local hospital.

On July 26, officers, including an ECIT officer, responded to a naked man sitting on an empty building overlooking the Willamette River. After talking to him it was determined he had a recent history of methamphetamine use and no history of mental illness. The officers backed off and the man came down on his own later in the day.

On July 30, officer responded to a man armed with a handgun threatening suicide in the parking lot of a downtown club. An ECIT officer approached behind cover. The man initially refused to engage, but eventually divulged he was triggered by the recent death of his father. After some time he set down the firearm and was transported to the hospital.

On August 6, officers were dispatched to a man wandering in traffic. An ECIT officer responded as the man started to climb over the railing on the bridge. The bridge was shut down and officers engaged him in conversation for about 30 minutes before he came back over the railing and was taken into custody and transported to a hospital.

On August 18, officers responded to the Broadway Bridge on a man threatening suicide. Officers requested an ECIT officer who responded. After approximately 20 minutes of negotiation, the man was placed on a Police Officer’s Hold and transported to a hospital.

On August 25, two ECIT officers responded to the call of a man threatening to jump from mid-span of the Morrison Bridge. On arrival they engaged the man and after a short while he agreed to come back to the sidewalk. He was transported to a local hospital.

On September 20, an ECIT officer was called to the Morrison Bridge on a man with a gun to his head threatening suicide. Officers were able to determine that a stick had been misidentified by the caller as a gun and, after speaking with him for an hour, he came back over the railing and was transported to the hospital.

On September 25, an officer drove by a woman clinging to the fencing on the overpass of SE Holgate at I-205. Additional resources arrived, including an ECIT officer who organized the communication and the arrival of additional resources. The woman was eventually talked back to the sidewalk after more than an hour of negotiation and taken to a hospital for evaluation.

2018 Q4 Update:  PPB continued to share examples of the work of ECIT officers both internally and externally through its social media such as:

On October 24th, ECIT officers assisted a BHU officer/clinician team in contacted a female in possession of a MAC-10-type weapon and removing it from her household. They were able to continue working with her after this event due to the trust and rapport they had established.

On November 6th, an ECIT officer spoke with an extremely distraught juvenile female threatening to jump from the Vista Bridge for over an hour. Eventually she agreed to be transported to the hospital.

Also on November 6th, a male veteran called from his home threatening suicide with a firearm. ECIT officers spoke to him over the phone and he agreed to come out and go to the hospital.

On December 6th, a woman threatening to jump from her 6th floor window was convinced by an ECIT officer to go with medical to the hospital for evaluation.

On December 23rd, ECIT officers responded to a distraught man trying to drive his car into the river in Cathedral Park. They first
were able to block his car in and then safely convince him to go to a hospital for evaluation.

On December 24th, ECIT officers made contact with a female sitting mid-span on the Ross Island Bridge. After almost 45 minutes she surrendered and was taken to the hospital for evaluation.

2019 Q1 Update: On January 14th, ECIT officers served to assist in the communication with a woman on the Burnside Bridge hearing voices and threatening to jump. After talking with her for some time, she agreed to seek help and was transported on a Police Officer Custody.

On January 20th, an ECIT officer made contact with a subject who had just pointed a gun at his wife’s head and was now threatening suicide. After more than 40 minutes of conversation, the subject surrendered and was taken into custody.

On February 18th, a woman went inside a SE pub and began to wave around a knife threatening patrons inside. She ran away before officers arrived, but was located by K9 nearby. An ECIT officer began communications with her and she was taken into custody without force and transported to the hospital.

On March 4th, ECIT officers were on scene of a man armed with a knife on an overpass in SW. As officers arrived, he jumped off the overpass to the highway below. He continued to hold the knife to his throat, threatening suicide. Eventually, he was taken into custody and transported to the hospital.

2019 Q2 Update: PPB continued to share examples of the work of ECIT officers both internally and externally through its social media such as:

On April 7th, an ECIT officer and cover officers approached a man seen waving a handgun around while walking down a sidewalk. The officers communicated with him while approaching from behind cover and took him into custody safely.

On April 20th, several officers were dispatched to the call of a man waving a gun around near a Transit Center. Shortly after, the man was confronted by a team of officers where the ECIT officer led the communications and the man was safely taken into custody.

On May 1st, a homeowner calling to say a stranger was in his house armed with a knife while suffering a mental health crisis. This lead to a large police response. The communication was led by ECIT officers and the subject eventually surrendered without anyone being injured.

On May 8th, ECIT officers assisted with a woman who was threatening suicide next to the Willamette River and began cutting her wrists with broken glass. The officers continued engaging her in conversation until other police and fire units were able to take her into custody safely.

On May 26, an ECIT and cover officer responded to a man in a suicidal crisis hanging out of the window of a fourth story apartment. They took immediate and direct action dragging him back through the window. The ECIT officer then arranged a transport to Unity on a Custody Hold.

On June 3rd, ECIT officers to a delusional man in a suicidal crisis hanging over the edge of the Steel Bridge. ECIT spoke with him for over 3 hours until he came back over the rail. A plan was coordinated to contact him later under safer conditions for him and the public.

On June 4th, officers arrived at a house where an unknown male had broken in and was tearing the place up. The police made a plan and, with the ECIT officer handling the communication, entered the house and were able to take the man into custody with no injuries.

2019 Q3 Update: On July 1, multiple police resources responded to a domestic violence call where the subject was threatening his family with multiple firearms. ECIT officers were on the scene and assisted in the communication into the residence. The situation was safely resolved with no injuries and the subject taken into custody.
On July 5, an ECIT officer responded with cover units to a woman standing on her porch with a handgun pointed at her head. Behind a ballistic shield, the officer approached and eventually convinced the woman to surrender. She was taken into custody and transported for evaluation.

On July 12, an ECIT officer assisted cover officers in responding to a woman in a parking structure sitting on the ledge of the 13th floor. After two hours of conversation, the woman stepped away and was placed on a Police Officer’s Hold and transported for evaluation.

On July 14, an ECIT officer responded to the Steel Bridge on a person on the upper most level threatening suicide. The ECIT and cover officers made contact, established a rapport and were able to take the individual into custody and transport to a hospital for evaluation.

On August 15, officers, including an ECIT officer, responded to a call of a man walking down the street threatening random community members with a knife. They were able to gain containment and then establish communication which resulted in him being taken into custody without the use of force and placed on a Police Officer Hold.

On August 18, ECIT officers assisted on the call of a man in severe mental health crisis throwing objects out of his third story window. With the use of other specialty units, the man was safely transported to a hospital for evaluation.

On September 1, an ECIT officer assisted in the eventual custody of a woman threatening suicide from the top floor of a public parking structure. After slowly establishing rapport, the officer was able to take her to a hospital on a Police Officer Hold.

On September 16, a call was made of a man holding a machete to his throat and threatening suicide at a convenience mart. An ECIT officer, with cover officers, made contact and, after speaking with him for some time, was able to have him drop the weapon and surrender. He was transported to the hospital for evaluation with no use of force by police.

2019 Q4 Update: On November 19th, BHU and ECIT officers responded to a female threatening suicide with a knife in the middle of the street while blocking a street car. The CIT officers used communication to tactically distract her while she was taken into custody without injury and transported to the hospital.

On November 24th, a male subject in crisis and carrying two knives was yelling in the street for officers to kill him. ECIT officers arrived and set up a communication team. After a protracted event, he was taken into custody without injury and transported to the hospital.

On December 11th, two ECIT officers responded to the Vista Bridge on a male threatening to jump. They initiated a conversation and were eventually able to have him voluntarily transported to the hospital for evaluation.

2020 Q1 Update: The BHU published the quarterly newsletter highlighting the new ECIT members, current ECIT officers' successes, and BHU programs.

2020 Q2 Update: On April 15, 2020, PPB and ECIT safely resolve incident involving a suicidal subject armed with a knife entering a bank.

On May 07, 2020, PPB and ECIT Officers convinced an armed man in crisis to relinquish his weapons.

On May 01, 2020, a person in crisis threatening with knives was taken into custody and transported to hospital.

On June 20, 2020, a person in crisis climbed a large high-rise tower crane and was safely rescued after communication efforts and collaboration with other first responders.

The BHU Lieutenant provided a presentation to the Portland Committee for Community Engaged Policing (PCCEP) Behavioral
Health Subcommittee on April 21, 2020 regarding BHU and the BHU Advisory Committee (BHUAC).

The BHU published the quarterly newsletter highlighting the new ECIT members, current ECIT officers' successes, and BHU programs.

**2020 Q3 Update:** The BHU Lieutenant provided presentations to the Portland Committee for Community Engaged Policing (PCCEP) Behavioral Health Subcommittee on July 7, 2020, and September 1, 2020. The presentation consisted of information regarding the Behavioral Health Unit (BHU) structure and operations, as well as the Police Bureau’s scaled crisis response framework.

As far as highlights in the media relating to crisis intervention:

On July 7, 2020, Portland Police disarmed man in mental health crisis holding a rifle, while standing on his porch.

On July 09, 2020, Portland Police Chief Chuck Lovell increases Community Engagement Division, which includes the Behavioral Health Unit (BHU)

On July 11, 2020, Portland Police responded to I-405 because a woman was dangling over the overpass.


On September 9, 2020, PPB’s BHU was mentioned in an article about how law enforcement organizations around the country have adapted their responses.

On September 29, 2020, PPB’s BHU was mentioned in an article about one of the first police-led BHUs in Georgia, formed in Savannah, which is modeled after the BHU at the Portland (Ore.) Police Dept.

**2020 Q4 Update:** On December 1st, 2020, a BHRT team and the BHU Lieutenant presented to the Portland Committee for Community Engaged Policing (PCCEP) Behavioral Health Subcommittee about the work being done in BHU.

The BHU Lieutenant and BHU analyst provided presentations to the IACP and BAC. Both of these presentations consisted of information regarding the Behavioral Health Unit (BHU) structure and operations, as well as the Police Bureau’s scaled crisis response framework and BHU’s performance measures.

On October 9, 2020, members of the BHU presented at the national “Faith in Blue” symposium regarding the structure of the BHU and the work done within.

The BHU Lieutenant provided a presentation and facilitated a discussion with a University of Portland – Sociology of Policing course, regarding the work of the BHU and the Police Bureau’s scaled crisis response model/structure.

The CIT coordinator helped facilitate a portion of the CIT training for the BOEC dispatcher academy on October 7th.

The CIT Coordinator taught Project Respond Clinicians for Project Respond Safety Training on November 30th and December 4th.

BHU received inquiries from multiple jurisdictions regarding PPB’s Crisis Response Model, PPB’s mental health training, and the make-up of BHU and how the unit operates.

• On November 24th the BHU Lieutenant and CIT Coordinator met with members of Oakland’s “Reimagining Public Safety Taskforce” via Zoom.
• On December 9th the BHU Lieutenant, CIT Coordinator, and BHU Training Liaison met with members of Philadelphia’s Behavioral Health and Justice Division.

As far as highlights in the media relating to crisis intervention:
Department of Justice Tasks / Quarterly Update Report

- On December 11, 2020, there was an article that highlighted the Bureau’s re-organization to fill shifts, reduce overtime and improve response times as the bureau faces an approximately $2 million deficit this fiscal year. BHU was one of the unit’s impacted by this re-org.
- San Mateo County Sheriff's Department launching new mental health program based on the ECIT model from the Portland Police Bureau.

2021 Q1 Update:

- On January 5th, 2021, the BHU Lieutenant, a BHU Sergeant, the CIT Coordinator, and an ECIT patrol officer presented to and engaged in a Q&A with the PCCEP Behavioral Health Sub-committee.

- On January 12th, the CIT Coordinator presented on Active Threat to a group of employees from Cascadia Behavioral Health.
- On January 12th, the CIT Coordinator presented the Police Bureaus “Community Active Shooter Presentation” to a group from Cascadia Behavioral Health via WebEX.

- On February 2nd, the BHU Lieutenant, the SCT Program Manager, and the CIT Coordinator, attended the PCCEP Behavioral Health Sub-committee meeting and participated in a discussion about building trust between PPB and the community.

- On February 4th, the SCT Program Manager, a BHRT Officer and Clinician attended the DA Strategic Prosecution Unit Meet and Greet.

- On February 4th, the BHU Lieutenant, the SCT Officer, and a BHRT Officer presented a BHU/SCT overview for new City Commissioner Ryan, Mapps, and Rubio’s office.

- On February 8th, the BHU Lieutenant attended a meeting for Multnomah County for their Behavioral Health Resource Center, First Responder Stakeholder group for the planning of the facility.

- On February 8th, the BHU Lieutenant attended the Unity Center’s Transition of Care Meeting.

- On February 9th, the SCT Program coordinator attended a Meeting with Vice President of Portland Business Alliance.

- On February 15th, the BHU Lieutenant, a BHRT officer and an ECIT Officer attended the Rockland Coalition to End the New Jim Crow (RCENJC) – Mental Health Committee regarding the Police Bureau’s scaled crisis response model and the BHU.

- On February 16th, the CIT Coordinator, both BHU Sergeants, 2 BHRT officers, and 2 BHRT clinicians attended a meeting with the OHSU New Directions Program.

- On February 16th, the CIT Coordinator, both BHU sergeants, 2 BHRT officers, the SCT officer, and two BHU clinicians had a meeting and presentation at the OHSU New Directions Program.

- On February 16th, the CIT Coordinator presented information about PPB’s crisis response and training, BHU, and an overview of communication to the Oregon College of Oriental Medicine.

- On February 23rd the SCT Program Manager attended meetings with both the director of Clean and Safe and the Portland Business Alliance. On this date the SCT Program Manager also attended a meeting with Native American Rehabilitation Association/NARA’s ACT team.

- On February 24th, 2021 the SCT Program Manager attended the Public Health and Safety Meeting – hosted by Berk Nelson/Prosper Portland.

- On March 2nd, the CIT Coordinator attended the PCCEP Behavioral Health Sub-committee meeting and continued a discussion about building trust between PPB and the community.

Friday, May 7, 2021
On March 4th, the SCT Program Manager, a BHRT officer, the SCT Officer, and a BHU Clinician attended the Bybee Lakes Board Member Meet and Greet.

On March 8th, the BHU Lieutenant and the SCOT Program Manager attended the Local Public Safety Coordinating Council - presentation on Frequent User System Engagement/FUSE.

On March 9th, the SCT Program Manager and the SCT Officer attended the Downtown Public Safety Coordinating Council - SCT Presentation.

On March 10th, the SCT Program Manager attended the Frequent User System Engagement/FUSE - SCT presentation.

On March 16th, the SCT Program Manager attended the Behavioral Health Emergency Coordinating Network - Criminal Justice workgroup.

On March 16th, the CIT Coordinator participated in a panel discussion hosted by Catholic Community Services regarding interactions between community health providers, people from marginalized communities, and the police.

On March 24th, the BHU Lieutenant and the SCT Program Manager attended the BHUAC Community Meeting.

On March 29th, 2021 the SCT Program manager and Officer attended the Safe and Strong Presentation to SCT.

On March 30th, 2021 the SCT Program Manager and CIT Coordinator met with Frontline Services/non-profit - BHU/SCT meet and greet.

On March 31st, the SCT Program Manager attended the Behavioral Health Emergency Coordinating Network - Stakeholders work group.

As far as highlights in the media relating to crisis intervention:

On January 15th, 2021 as ECIT officers were responding to a man who showed arriving officers a knife and held it to his neck, and said he would kill himself, a protest formed around them.
**ECIT members will gather appropriate data during crisis events**

**Task Requirements:** For each crisis event to which an C-I Team officer is dispatched, the C-I Team member shall gather data that ABHU shall utilize to track and report data on public safety system interactions with individuals with perceived or actual mental illness or who are in crisis.

For specific data requirements, see DOJ Agreement #105

*NOTE: PPB refers to "C-I Team" as "Enhanced Crisis Intervention Trained officers" (ECIT officers)*

**Status**  Actively in Process

**Action Steps:**
1. BHU Analyst will work with partners to develop data capturing code (SQL code) for use in PPB's data systems
2. BHU will gather data from crisis calls where an ECIT officer is dispatched
3. BHU will pull data from various reports of an incident (i.e. incident reports, force reports, narratives of the event, etc.) in order to perform analysis

**Task Date Completed:**

**Evidence of Completion:**
1. Email conversations to and from IT staff

**Status Note:**

**2014 Q1 Update:** BHU and SSD continued discussions with BOEC to establish mechanism/code for BHU to readily identify those calls specifically requesting ECIT officer's response. Proposed solution being vetted at BOEC

**2014 Q2 Update:** ECIT code was created and went into effect on May 15, 2014. BHU analyst now gathering data from those dispatched calls to track and report on most of the data points listed in the Agreement.

**2014 Q3 Update:** BHU continued to gather data on most of the data points listed in the Agreement on ECIT calls for which a report was written. It has been discovered that not all ECIT dispatched calls result in written report so remedies for that are now being explored so that more accurate data might be obtained.

**2014 Q4 Update:** As noted last quarter, because not all ECIT dispatched calls result in a report being written by the ECIT officer at this point, the data collected for this purpose is far from complete. Much this quarter was spent with various staff members brainstorming the possible technical fixes that could be implemented pending the go-live date for RegJIN, PPB's new data system. A couple of options were identified as the most feasible. Obviously, the immediate resolution of this problem is complicated by the fact that IT personnel are overwhelmed by the demands of RegJIN right now so response to programming requests is delayed. In the meantime, a meeting was held with the ECIT internal advisory committee to emphasize the need for ECIT officers to report on these calls until a technical solution is

**2015 Q1 Update:** Because of the low response rate/report rate of ECIT dispatched calls in previous quarters, an ECIT Template was introduced and implemented in February 2015. The template is the tool used to collect required data on certain calls. Officers are required to complete the template if they use ECIT skills on a mental health crisis call whether it is their district call or they are dispatched to assist.

The analysis for ECIT calls for this quarter is included in the supporting documents folder.

**2015 Q2 Update:** For this quarter, ECIT officers completed 209 templates, on 207 dispatched calls (multiple ECIT officers respond to same call). That template requires all the data outlined in this action item. There was an average of 2.3 templates filled out per day, in which ECIT officers responded to and used their specialized training during the call. For the 209 completed templates, ECIT officers indicated that 52.6% (N=110) of the time they responded to a call, they either assisted and or consulted on the call.

**2015 Q3 Update:** In the third quarter, ECIT officers completed 158 templates on 155 dispatched calls (multiple ECIT officers respond to same call). That template requires all the data outlined in this action item. There was an average of 1.7 templates filled out per day, in which ECIT officers responded to and used their specialized training during the call. For the 158 completed templates, ECIT officers
indicated that 53% (N=83) of the time they responded to a call, they were primary officer on the call.

The reason for the decline in the number of templates from last quarter was not readily apparent. Thus the BHU sent out a memo reminding officers of the ECIT template process, the importance of measuring and capturing the work of the ECIT officers, and why it is crucial that ECIT officers fill out an ECIT Template or a handwritten ECIT report on every call where there is a person in mental health crisis and the officer uses one's CIT/ECIT skills.

**2015 Q4 Update:** For this quarter, ECIT officers completed 174 templates on 172 dispatched calls (multiple officers respond to same call) to which they responded and used their specialized training during the call. The template requires all the data outlined in this action item.

**2016 Q1 Update:** The BHU ceased its collection of ECIT related data from stand-alone text templates on February 29, 2016. So for the two months (1/1/16 – 2/29/16), ECIT officers completed 146 templates on 144 dispatched calls (multiple officers respond to same call) to which they responded and used their specialized training during the call. The template requires all the data outlined in this action item.

All subsequent ECIT related data will be gathered from the Portland Police Bureau’s (PPB) new Mental Health Mask, which was implemented by PPB’s Strategic Services Division (SSD), over the course of this quarter.

**2016 Q2 Update:** The BHU began using ECIT related data gathered from the Portland Police Bureau’s (PPB) Mental Health Mask (MHM) this quarter. For 2016 Q2, PPB received 1,127 MHMs that reported an ECIT officer was on scene and acting in their capacity as an ECIT officer. ECIT officers authored 660 of these MHMs. Also, ECIT officers self-dispatched themselves to 47% of these calls.

**2016 Q3 Update:** The BHU is still using ECIT related data gathered from the Portland Police Bureau’s (PPB) Mental Health Mask (MHM) for this quarter. For 2016 Q3, PPB received 1,115 MHMs that reported an ECIT officer was on scene and acting in their capacity as an ECIT officer. ECIT officers authored 660 of these MHMs. Also, ECIT officers self-dispatched themselves to 44% of these calls.

**2016 Q4 Update:** The BHU continued using ECIT related data gathered from the Portland Police Bureau’s (PPB) Mental Health Mask (MHM) this quarter. For 2016 Q4, PPB received 991 MHMs that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 548 (55%) of the MHMs. Also, ECIT officers self-dispatched themselves to the 412 (42%) of these calls, while BOEC dispatched an ECIT officer to 395 (40%) of the calls.

Nevertheless, for 2017 Q1, PPB received 1,102 MHMs that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 640 (58%) of the MHMs. Also, ECIT officers self-dispatched themselves to the 477 (43%) of these calls, while BOEC dispatched an ECIT officer to 454 (41%) of the calls. A revised plan for data collection was discussed in the first part of 2017, with a plan for implementation by May 2017.

**2017 Q2 Update:** The BHU discontinued using ECIT related data gathered from the Portland Police Bureau’s (PPB) Mental Health Mask (MHM) on April 24, 2017. Nevertheless, from April 1 through April 24, 2017, PPB received 307 MHMs that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 207 (67%) of the MHMs.

The Portland Police Bureau revamped the way it is collecting mental health related data during 2017 Q2. As of April 25, 2017, data on ECIT officer activity is collected through the Mental Health Template (MHT) rather than MHM. If a call had a mental health component and an ECIT officer was on scene acting in their capacity as an ECIT officer, the ECIT officer will fill out the MHT and attach it to a General Offense (GO) report. From April 25 through June 30, 2017, PPB received 565 MHTs that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 467 (83%) of the MHTs.

**2017 Q3 Update:** The BHU continued to use ECIT-related data gathered from the Portland Police Bureau’s (PPB) Mental Health Template (MHT) this quarter. For 2017 Q3, PPB received 727 MHTs on 699 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 628 (86%) of the MHTs.
2017 Q4 Update: The BHU continued to use ECIT related data gathered from the Portland Police Bureau’s (PPB) Mental Health Template (MHT) this quarter. For this quarter, PPB received 670 MHTs on 634 calls (multiple MHTs per call), that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 542 (81%) of the MHTs.

2018 Q1 Update: BHU gathered data from the Mental Health Template (MHT). For this quarter, PPB received 942 MHTs on 810 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 727 (77%) of the MHTs.

Furthermore, in order to demonstrate that PPB has a “capable system and resources for responding to persons in mental health crisis,” during this quarter PPB, along with other City partners, revised an analysis to assess the differences in outcomes for ECIT and non-ECIT responses to mental health related calls. This assessment was combined with the other analyses the COCL had recommended into a comprehensive report.

Also, to ensure ongoing evaluation of its mental health crisis response model, PPB will implement a continuing quality assurance (QA) program for ECIT related data and outcomes. This QA program will help PPB recognize and correct data issues, and will provide a basis to explore ongoing improvements to the mental health response system. The multi-level QA program will be focused on: 1) the reliability and validity of data; 2) using data to inform decisions; and 3) exploration and reporting of data. In order to maintain data consistency, reliability and validity, both PPB and BOEC will be utilizing one dataset to monitor ECIT related calls and data associated with those calls.

2018 Q2 Update: In this quarter, PPB received 1,039 MHTs on 907 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 816 (79%) of the MHTs.

Also, as part of PPB’s newly created quality assurance (QA) plan for ECIT related data and outcomes, analysts audited April, May and June data. This protocol will continue on a monthly basis.

2018 Q3 Update: During the third quarter, PPB received 704 MHTs on 702 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 587 (83%) of the MHTs.

Also, as part of PPB’s newly created quality assurance (QA) plan for ECIT related data and outcomes, analysts audited July, August and September data. This protocol will continue on a monthly basis.

2018 Q4 Update: In the fourth quarter, PPB received 726 MHTs on 667 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 591 (82%) of the MHTs.

Also, as part of PPB's newly created quality assurance (QA) plan for ECIT related data and outcomes, analysts audited October, November and December data. This protocol will continue on a monthly basis.

2019 Q1 Update: During the first quarter, PPB received 641 MHTs on 602 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 532 (83%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2019 Q2 Update: In the second quarter, PPB received 702 MHTs on 670 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 592 (84%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2019 Q3 Update: During the third quarter, PPB received 636 MHTs on 610 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 499 (78%) of the MHTs.

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Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2019 Q4 Update: In the fourth quarter, PPB received 576 MHTs on 555 calls (multiple MHTs per call) that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. ECIT officers authored 467 (81%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2020 Q1 Update: During this quarter, PPB received 606 MHTs on 582 calls that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. It is possible that more than one subject was involved in the call. ECIT officers authored 482 (80%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2020 Q2 Update: In the second quarter, PPB received 631 MHTs on 612 calls that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. It is possible that more than one subject was involved in the call. ECIT officers authored 490 (78%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2020 Q3 Update: During the third quarter, PPB received 464 MHTs on 452 calls that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. It is possible that more than one subject was involved in the call. ECIT officers authored 321 (69%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2020 Q4 Update: In this quarter, PPB received 397 MHTs on 395 calls that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. It is possible that more than one subject was involved in the call. ECIT officers authored 310 (78%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.

2021 Q1 Update: During this quarter, PPB received 450 MHTs on 435 calls that reported an ECIT officer was on scene acting in their capacity as an ECIT officer. It is possible that more than one subject was involved in the call. ECIT officers authored 302 (67%) of the MHTs.

Also, as part of PPB's quality assurance (QA) plan for ECIT related data and outcomes, analysts continue to audit associated data on a monthly basis.
Expansion of Mobile Crisis Prevention Team

**Task Requirements:** … the City shall expand Mobile Crisis Prevention Team (MCPT) to provide one MCPT car per PPB precinct. Each MCPT car shall be staffed by one sworn PPB officer and one qualified mental health professional. MCPT shall be the full time assignment of each such officer.

*NOTE: PPB refers to "MCPT" as "MCU" or "Mobile Crisis Unit"

**Status**  Complete - pending external review

**Action Steps:**
1. BHU will advertise for two additional MCU positions.
2. BHU will perform background checks per the requirements of the agreement on all applicants for the MCU positions
3. BHU will expand contract with Project Respond to include two additional Qualified Mental Health Professionals
4. The BHU will staff all three MCUs with one sworn PPB officer and one qualified mental health professional

**Task Date Completed:** 4/2/2013  
**Received DOJ Approval?**  Approval

**Evidence of Completion:**
1. Personnel orders and Personnel Action Forms (PAFs) (located in folder #91)

**Status Note:**

2014 Q1 Update: There is a MCU for each of the three precincts.

2014 Q2 Update: Three MCU teams continue to serve the Bureau.

2014 Q3 Update: The number of Mobile Crisis teams remains at 3, each serving one of the Precincts.

2014 Q4 Update: The number of Mobile Crisis teams remains at 3. However, they were re-designated as the Behavioral Health Response Teams (BHRT) in order to better reflect the mission as a follow up team and not a crisis response unit.

In BHRT2 (East Precinct), Officer Sean Christian moved to the Service Coordination Team Officer so Officer Shaye Samora took his place.

2015 Q1 Update: There were no BHRT changes this quarter.

2015 Q2 Update: There were no changes to the three Behavioral Health Response Teams this quarter. The BHU continues to oversee three police officer/mental health clinician partner cars that conduct follow up on referrals from patrol officers.

2015 Q3 Update: During this quarter, the BHU selected a new BHRT Officer, Michael Hansen, to replace Josh Silverman who is returning to Patrol. Officer Hansen started in October 2015. He met all required criteria. BHRT will be his fulltime assignment and he will be paired with a mental health professional.

2015 Q4 Update: There were no changes in the BHRTs this quarter.

2016 Q1 Update: There were no changes in the BHRTs this quarter.

2016 Q2 Update: There were no changes in the BHRTs this quarter

2016 Q3 Update: There were no changes in the BHRTs this quarter

2016 Q4 Update: There were no changes in the BHRTs this quarter

2017 Q1 Update: Lindsey Higginson, a Project Respond clinician, is now working with the BHU full time as a replacement for Averyl Growden. Project Respond is also providing clinicians on a rotating basis to help fully staff the BHRTs when staff are on leaves.

2017 Q2 Update: There were no changes in the BHRTs this quarter.

2017 Q3 Update: There were no changes in the BHRTs this quarter.

However, the BHU Sergeant(s) began the screening process of officers who applied to be a BHRT officer in anticipation of a vacancy due to an officer’s pending promotion. The position announcement was posted bureau-wide on August 31, 2017. The BHU Sergeant(s) followed the requirements of the applicable SOP by contacting Professional Standards Division and the
supervisors of officers interested in the position, as well as independently conducting a review of each applicant’s EIS record in order to determine eligibility.

2017 Q4 Update: During this quarter, the BHU selected a new BHRT Officer, Chase Bryson, to replace Shaye Samora who was promoted to the rank of Detective. Officer Bryson started in October 2017. He met all required criteria. BHRT will be his fulltime assignment and he will be paired with a mental health professional.

2018 Q1 Update: Because CIT coordinator Jason Jones is temporarily attached to Central Precinct as an acting sergeant, BHRT Jim Stegemeyer is serving as the acting CIT coordinator. Thus, Kyle Hefley, an ECIT trained officer, is temporarily attached as a BHRT officer in Ofc. Stegemeyer’s place.

2018 Q2 Update: Officer Jim Stegemeyer is now the CIT coordinator.

In addition, Kyle Hefley, an ECIT trained officer who was temporarily attached to BHU as a BHRT officer, is now assigned to BHU in that role.

Also, as part of the 2018-19 budget process, the City of Portland has approved 2.0 FTE sworn BHRT positions and contracted services for two clinicians to expand the Behavioral Health Unit (BHU) to serve more individuals in behavioral crisis resulting from known or suspected mental illness and or drug and alcohol addiction.

2018 Q3 Update: During this quarter, the BHU added a new BHRT team. Officer Billy Kemmer, who previously served as the program manager of the Service Coordination team and who is also an ECIT trained officer, and Project Respond clinician Sarah Attal, joined the BHU in September as the fourth BHRT team. All required EIS and administrative checks of Officer Kemmer were completed and documented.

2018 Q4 Update: Officer Amy Fraser, who is an ECIT trained officer, and Project Respond clinician Elaina Lecher joined the BHU in 2018 Q4, as the fifth BHRT team. All required EIS and administrative checks of Officer Fraser were completed and documented.

2019 Q1 Update: There were no changes in the BHRTs this quarter.

2019 Q2 Update: There were no changes in the BHRTs this quarter.

2019 Q3 Update: There were no changes in the BHRTs this quarter.

2019 Q4 Update: There were no changes in the BHRTs this quarter.

2020 Q1 Update: There were no changes in the BHRTs this quarter.

2020 Q2 Update: There were no changes in the BHRTs this quarter.

2020 Q3 Update: CIT Coordinator Jim Stegemeyer retired in August. He was replaced by BHRT officer Chase Bryson. The BHRT officer replacement position has been selected and a transfer plan is in place for the fourth quarter.

2020 Q4 Update: With BHRT officer Chase Bryson assuming the role of CIT Coordinator after the retirement of Off. Stegemeyer, it left one BHRT officer position vacant. It was not filled during this quarter nor will it be in foreseeable future. This is due to several factors, primarily the significant budget cut that PPB experienced as well as PPB staffing shortages.

Furthermore, another BHRT officer will be transferred back to patrol duties. Thus, for 2021 Q1, BHU will be operating with three BHRTs, with each one housed in one of the Bureau’s three precincts. This is the same model BHU utilized prior to 2018 Q3.

2021 Q1 Update: One BHRT officer was transferred back to patrol duties in this quarter and a clinician was transferred out of the Police Bureau. Thus, BHU is now operating with three BHRTs, with each covering one of the Bureau’s three precincts. This is the same model BHU utilized prior to 2018 Q3.

2021 Q2 Update: 

2021 Q3 Update:

2021 Q4 Update:
MCPT member qualifications

Task Requirements: No officers may participate in MCPT if they have been subject to disciplinary action based upon use of force or mistreatment of people with mental illness within the three years preceding the start of MCPT service, or during MCPT service. PPB, with the advice of the ABHU Advisory Committee, shall define criteria for qualification, selection, and ongoing participation of officers in the MCPT.

*NOTE: PPB refers to "MCPT" as "MCU" or "Mobile Crisis Unit"

Status Complete - pending external review

Action Steps:
1. BHU will review EIS system for all MCU applicants
2. BHU will ask supervisors of applicants to fill out performance questionnaires in addition to standard PPB Chain of command selection process reviews
3. BHU will interview applicants with assistance from Project Respond and Advisory Council will develop protocols for selection

Task Date Completed: 4/2/2013  Received DOJ Approval? Approval

Evidence of Completion:
1. MCU 2013 Supervisor questionnaires
2. MCU 2013 Interview panel questionnaires
3. MCU position announcements from November, 2012 and June, 2013
4. ECIT Supervisor Questionnaire (located in folder #101)

Status Note:
2014 Q1 Update: No changes to qualifications
2014 Q2 Update: No changes to the qualifications.
2014 Q3 Update: No changes to the qualifications.
2014 Q4 Update: Officer Samora participated in the selection process in the 3rd Quarter of 2014 and went through the established evaluation process (i.e. Interview, EIS review, Supervisor review). She was transferred to the BHRT officer position on 11/06/14.
2015 Q1 Update: No changes to the qualifications nor to the BHRT membership this quarter. However, BHU Sergeants continue to monitor current BHRT members to ensure these qualifications continue to be met.
2015 Q2 Update: BHU Sergeants continue to monitor current BHRT members to ensure BHRT qualifications are met.
2015 Q3 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.
2015 Q4 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment. BHUAC weighed in previously on the criteria for assignment.

2016 Q1 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

The BHUAC began reviewing SOP 3.3 which will include criteria for qualification, selection, and ongoing participation. This review will continue into the next quarter.

2016 Q2 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

The BHUAC took the opportunity to review SOP 3.2 BHRT. The draft changes in this document contain the criteria for qualification, selection, and ongoing participation of BHRT officers. The BHU approved the draft SOP with additional
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2016 Q3 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

The BHUAC took the opportunity to review SOP 3.2 BHRT. The draft changes in this document contain the criteria for qualification, selection, and ongoing participation of BHRT officers. The BHU approved the draft SOP with additional recommendations. The SOP was reviewed and signed by the Commander of Central Precinct.

2016 Q4 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2017 Q1 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2017 Q2 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2017 Q3 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2017 Q4 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

The BHU is planning to work with the BHUAC to modify SOP 3.2 at the January 2018 meeting.

2018 Q1 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

The BHU worked with the BHUAC to modify SOP 3.2 at the January 2018 meeting.

2018 Q2 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2018 Q3 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2018 Q4 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2019 Q1 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2019 Q2 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2019 Q3 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2019 Q4 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2020 Q1 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2020 Q2 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2020 Q3 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

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2020 Q4 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2021 Q1 Update: BHU Sergeants and the Lieutenant continue to monitor current BHRT members through EIS and PSD to ensure BHRT qualifications are maintained throughout the course of the assignment.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
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Task Description: Specially train MCPT members

Task Requirements: PPB shall specially train each MCPT member before such member may be utilized for MCPT operations. PPB, with the advice of the ABHU Advisory Committee, shall develop such training for MCPT members.

*NOTE: PPB refers to "MCPT" as "MCU" or "Mobile Crisis Unit"

Status: Complete - pending external review

Action Steps:
1. BHU will require MCU officers and clinicians to attend the ECIT training course
2. New MCU officers and clinicians will ride with an experienced officer or clinician before being permanently paired up with a partner
3. MCUs will attend additional training based on availability and funding, including: Applied Suicide Intervention Skills Training (ASIST); Trauma Informed Care; and Civil Commitment Investigator Training

Evidence of Completion:
1. Civil Commitment Investigator Training Lesson Plan
2. Trauma Informed Care Training Lesson Plan
3. ASIST Training Lesson Plan

Task Date Completed: 5/31/2013

Received DOJ Approval: Approval

Status Note:

2014 Q1 Update: No change in MCU staffing so no special training held.

2014 Q2 Update: No change in staffing so no special training held

2014 Q3 Update: MCPT members participated in the Threat Management Conference in August and Youth Mental Health First Aid in September.

2014 Q4 Update: During this quarter, BHRT officers and clinicians attended Threat Assessment Training at Willamette University in Salem, Oregon on October 4-16; on October 15, Clinician Cindy Hackett (BHRT3) attended the NW Crisis Negotiators Conference; and on November 20-21, BHRT Officer Jim Stegemeyer attended the Applied Suicide Intervention Skills Training (ASIST).

2015 Q1 Update: On January 22-23, BHRT1 (North) and BHRT2 (East) officers completed the Civil Commitment Investigator Training. All BHRT officers and clinicians received the following additional training during this quarter:
• February 26, Criminal Justice-Behavioral Health Issues Conference
• February 10, Psychiatric Emergency webinar on Excited Delirium

BHRT officers and clinicians assisted PPB training division in basic Crisis Intervention Training scenarios on February 13, 2015 and in Cascadia's Project Respond clinician safety training on March 10-11, 2015. BHRT officers also assisted in PPB Crisis Negotiation Training scenarios on March 18, 2015.

2015 Q2 Update: BHRTs continue to avail themselves of trainings provided by community mental health partners and law enforcement to enhance their skills and abilities. Various members attended the following:
• Trauma Sensitive and Informed Approach to Behavioral Health and Criminal Justice--April 7
• FBI Basic Hostage Negotiation Training--May 11-15
• Assistance in SERT training scenarios--April 15
• Marijuana and Synthetic Drug Effects on the Brain --June 26

2015 Q3 Update: The BHRTs continue to avail themselves of trainings provided by community mental health partners and law enforcement to enhance their skills and abilities. Various members attended the following:
• Mental Health/1st Responder Conference in Spokane, Washington (September 2015)
• Association of Threat Assessment Professionals (ATAP) Annual Threat Management Conference in California (August 2015)
• Trauma Informed Care 201/Behavioral Health & Criminal Justice System in Portland (August 2015)
• NW Regional CIT Conference in Vancouver, Washington (September 2015)

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2015 Q4 Update:
Officer Michael Hansen, a new BHRT member, attended additional training this quarter in Trauma Informed Care, Applied Suicide Intervention Skills Training, and Threat Assessment to strengthen his crisis intervention knowledge and skills. Additionally, BHRT officers attended the Willamette University Threat Assessment training, the Pacific Northwest Negotiator Seminar, and a workshop on updates in the civil commitment process sponsored by Multnomah County Mental Health and Addiction Services.

BHRT 2 (Officer Samora and Clinician Brooks) represented the BHU at the I/DD and Mental Health Consultation Group Seminar, a training focused on a holistic approach to serving people with a dual diagnosis of Mental Health and Intellectual/Developmental Disability.

2016 Q1 Update:
All BHRT personnel have received the initial required training of ECIT, Applied Suicide Intervention Skills Training, Trauma Informed Care, and Civil Commitment proceedings. In addition, the BHU continues to send BHRT members to crisis intervention and mental health trainings or conferences sponsored by county, state, and service provider agencies. Training opportunities are based on availability of officers and impact on the BHU’s operational mission. During this quarter BHRT members attended the following training to further develop their knowledge of resources and skills to assess and interact with people diagnosed with a mental illness.

- The Oregon Psychiatric Physicians Association Public Safety/Mental Health Collaboration Conference (BHRT2- Officer Shaye Samora and Clinician Dinah Brooks)
- Too Much Stuff, A training for professionals who help with hoarding, sponsored by the Portland State University School of Social Work and Multnomah County Hoarding Task Force (All BHRTs)
- Civil Commitment Training; Involuntary Commitment Proceedings sponsored by Oregon Health Authority (BHU Sergeant and BHRT Officer Michael Hansen)
- Association Of Threat Assessment Professionals, NW Chapter quarterly training hosted by Portland Police Bureau (All BHRTs)

2016 Q2 Update:
All BHRT personnel have completed ECIT, ASIST, Trauma Informed Care and Civil Commitment proceedings training. In addition, the BHU continues to send BHRT members to crisis intervention, assessment and mental health collaboration trainings that are available through county, state and local service providers. Training opportunities are based on availability of officers, available funding, and impact on the BHU’s operational mission. During this quarter, BHRT Officers Samora and Hansen attended the annual Employee Assistance Program training which included information on communication, assessment and resources.

In May 2016, BHRT2 Officer Samora attended the FBI Basic Negotiations Course.

Also in May 2016, BHRT3 Officer Hansen attended a Threat Assessment Terrorism Mitigation Course.

The BHUAC reviewed and approved SOP 3.2 BHRT which contains the training recommendations for the BHRT officers. This draft SOP requires a review and signature from the Commander of Central Precinct so will be included in the next quarterly report.

2016 Q3 Update:
All BHRT personnel have previously completed the required courses. In addition, the BHU continues to send BHRT members to crisis intervention, assessment and other mental health related trainings that are available through county, state and local service providers. Training opportunities are based on officers' schedules, available funding, and impact on the BHU’s operational mission.

On July 26-27, Behavioral Response Team 1 (Officer Mike Hansen and Clinician Cindy Hackett) attended the Together Everyone Achieves More (TEAM) Conference in Spokane, Washington. The theme for the conference was Trauma Informed Care and First Responders (Response, Resiliency, Recovery).

On August 16-19, 2016, a majority of the BHU members attended the Threat Management Conference sponsored by the Association of Threat Assessment Professionals.

The BHUAC reviewed and approved SOP 3.2 BHRT which contains the training recommendations for the BHRT officers. The SOP was reviewed and signed by the Commander of Central Precinct.
2016 Q4 Update: All BHRT personnel have previously completed the required courses. In addition, the BHU continues to send BHRT members to crisis intervention, assessment and other mental health related trainings that are available through county, state and local service providers. Training opportunities are based on officers' schedules, available funding, and impact on the BHU's operational mission.

On October 13 – 14, BHU members Officers Jason Jones, Jim Stegemeyer and Shaye Samora, Sergeant Chris Burley and Lieutenant Tasha Hager participated in the NW Crisis Negotiation Seminar and Competition. The Portland Police Bureau’s Crisis Negotiations Team was awarded first place in the competition against several other Pacific Northwest teams.

On November 2 – 3, BHU member Officer Jim Stegemeyer and Service Coordination Team Manager Emily Rochon participated in the Oregon Department of Public Safety Standards and Training CIT Summit, which covered important mental health and crisis-related topics that intersect with police and service providers.

On December 2, BHU members Officer Jason Jones and Sergeant Todd Tackett participated in the Unity Behavioral Health Training Course for emergency medical services at the Good Samaritan Medical Center Auditorium. This training highlighted key changes in how peace officer holds and patient transports will be conducted upon the impending opening of the Unity Center.

2017 Q1 Update: All BHRT personnel have previously completed the required courses. In addition, the BHU continues to send BHRT members to crisis intervention, assessment and mental health trainings that are available through a variety of service providers. Training opportunities are based on availability of members, funding, and the impact on the BHU’s operational mission. Training for this quarter includes:

- In January 2017, several BHU members attended a 2-day training series related to male trauma.
- On February 2, 2017, members of the BHU attended a four hour training block on vicarious trauma, which was sponsored by the PPB Employee Assistance Program.
- From February 22 – 24, 2017, the CIT Coordinator attended three days of Critical Incident Stress Management (CISM) training on the topics of individual and group crisis intervention in Spokane, Washington.
- On February 28, 2017, BHU members attended a day of Mindfulness Training, sponsored by Pacific University.
- On March 8 – 9, 2017, several BHU members attended Trauma Stewardship training, hosted by Washington County Sheriff’s Office and presented by Laura van Dernoot Lipsky.
- On March 8, 2017, the Service Coordination Team Manager attended the OHSU High Utilizer Presentation.
- From March 13 – 17, 2017, the BHU Lieutenant participated in the international Association of Chiefs of Police Leadership Conference in Las Vegas, Nevada.
- On March 21, 2017, the CIT Coordinator and 6 ECIT Officers participated in the Thin Blue Lifeline: Tactical Verbal De-escalation Training for People Experiencing MH Crisis, hosted by Washington County.

2017 Q2 Update: All BHRT personnel have previously completed the required courses. In addition, the BHU continues to send BHRT members to crisis intervention, assessment and mental health trainings that are available through a variety of service providers. Training opportunities are based on availability of members, funding, and the impact on the BHU’s operational mission. Training for this quarter included:

- On April 10, 2017 the Service Coordination Team manager attended the “Suicide Prevention and Brain Health” training.
- On April 20, 2017, the Service Coordination Team manager attended the “Introduction to Assertive Engagement” training.
- From May 9 – 11, 2017, most BHU members attended the Denver Threat Management Conference.
- From June 6 – 8, 2017, BHU members attended the Idaho Threat Assessment Conference.
- On June 26, 2017, most BHU members attended the Oregon Law and Mental Health Conference.

2017 Q3 Update: BHRT members did not attend any additional trainings this quarter.

2017 Q4 Update: Training for this quarter included:

- From November 28 – 29, a BHU Sergeant, a BHRT officer and the Service Coordination Team Manager attended the State of Oregon Involuntary Commitment Program Training.

2018 Q1 Update: On February 28, 2018, BHRT members received training on the Trial Visit Monitoring program within Multnomah County’s
Involuntary Commitment Program. Ways to better collaborate with the ICP program and advocate for the persons PPB serves within BHU were also discussed.

**2018 Q2 Update:** The BHU continues to look for and participate in training designed to enhance the capabilities and knowledge of BHRT staff.

On April 18th, BHRT teams attended one day of training at DPSST on teen suicide and its prevention.

On May 10th and 11th, BHRT teams attended Applied Suicide Intervention Skills Training (ASIST) in Portland.

On June 5th, BHRT staff attended Risk Assessment For Violence – a one-day training in Portland.

On June 12th through 14th, the BHRT Sergeant attended threat assessment training at a regional event in Boise, ID.

On June 18th and 19th, the new BHRT officers and clinicians attended threat assessment training hosted by the Mid-Valley Threat Assessment Team in Salem, OR.

**2018 Q3 Update:** The BHU continues to send BHU supervisors and BHRT members to crisis intervention, assessment and mental health trainings that are available through a variety of service providers. Training opportunities are based on availability of members, funding, and the impact on the BHU’s operational mission. Training for this quarter included:

- From August 14 – 17, 2018, the Service Coordination Team Manager and one BHRT Officer attended the CIT International Conference and participated in several sessions on best CIT practices.
- From August 14 – 17, 2018, the BHU Lieutenant, BHU Sergeants, BHRT Officers and BHRT Clinicians attended the Association of Threat Assessment Professionals (ATAP) Threat Management Conference.

**2018 Q4 Update:** A BHRT officer and clinician, as well as the Service Coordination Team Manager and CIT Coordinator, attended the Northwest Regional CIT Conference in Kennewick, WA October 9th through 12th. The officer and Service Coordination Team Manager presented on the topic of “Thoughtful Approaches to Reduce Incarceration for Person Experiencing Behavioral Health Crisis.”

On November 27th, three sworn BHRT staff and two clinicians completed ten hours of Mental Health Investigation and Examiner Training taught by the Oregon Health Administration.

Also during this quarter, the two newest BHRT officers and clinicians attended Threat Assessment Training in Salem, Oregon.

**2019 Q1 Update:** On March 12-13, two sworn BHRT staff and three clinicians completed sixteen hours of Behavioral Threat Assessment Training taught by Third Degree Communication.

**2019 Q2 Update:** On June 10-11, five ECIT officers, attached to BHU, completed sixteen hours of Behavioral Threat Assessment Training at the Idaho Threat Assessment Conference.

**2019 Q3 Update:** From August 13 to 16, 2019, one ECIT officer, two sergeants and a Lieutenant attached to BHU, attended the 2019 Threat Management Conference.

**2019 Q4 Update:** The BHU continues to send BHU supervisors and BHRT members to crisis intervention, assessment and mental health trainings that are available through a variety of service providers. Training opportunities are based on availability of members, funding, and the impact on the BHU’s operational mission. Training for this quarter included:

- On November 22, a BHU Lieutenant, a BHU sergeant, a BHU crime analyst, and two BHRT officer/clinician pairs attended a NW chapter meeting of the Association of Threat Assessment Professionals.

- The BHRT clinicians attended a Mindfulness Practice and Self Care: Cultivating resiliency, longevity, and passion in your practice by Lisa Race, LCSW on December 16. The training was working with the Autonomic Nervous System: identifying triggers and action steps specifically for Ventral Vagal System, Sympathetic Nervous System, Dorsal Vagal System.
The BHU continues to send BHU supervisors and BHRT members to crisis intervention, assessment and mental health trainings that are available through a variety of service providers. Training opportunities are based on availability of members, funding, and the impact on the BHU’s operational mission. The COVID-19 Pandemic had a direct impact on scheduled trainings during this quarter. A number of scheduled/planned external trainings such as the ASSIST were either postponed or cancelled due to social distancing orders.

Training that occurred in this quarter prior to the crisis include:
- On January 10, a BHU Lieutenant, a BHU sergeant, and one BHRT officer/clinician pair participated in a NW chapter meeting of the Association of Threat Assessment Professionals.

BHRT members did not attend any additional trainings this quarter.

The BHU continues to send BHU supervisors and BHRT members to crisis intervention, assessment and mental health trainings that are available through a variety of service providers. Training opportunities are based on availability of members, funding, and the impact on the BHU’s operational mission.

Trainings for this quarter that were attended by various members included:
- Improved Decision Making: Your Brain on Threat Assessment Management
- Mass Attacks in Public Spaces—presented on August 6, 2020 by the U.S. Secret Service National Threat Assessment Center (NTAC)
- The Pre-Attack Behaviors of the Las Vegas Shooter: Key Findings from the FBI BAU’s Expert Panel
- That Night in Bataclan: A Post Traumatic Growth Story
- NAMI’s Ask the Expert Webinar: Impact of Racism and Trauma on Black Mental Health
- Oregon Health Forum Live Through it: Suicide Risk and Prevention in Covid -19
- Crisis Response - Reframing Crisis Services and Law Enforcement Partnerships Discussion Group
- Stress Management for Behavioral Health Professionals (Cascadia)
- Therapeutic Boundaries (Cascadia)
- Bloodborne pathogens (Cascadia)
- Suicide: Cultural Considerations When Working With Indigenous Populations (OHSU)

On December 07-11, 2020, BHU analyst attended the Crisis Services Management Negotiation Level 1 Course, as he is part of PPB’s Crisis Negotiation Team (CNT).

Throughout the quarter, the SCT Program Manager attended on-demand trainings from the National Association for Alcoholism and Drug Abuse Counselors/NAADAC.

The trainings are as follows:
- Meaning in life, Self-Forgiveness, and Locus of Control on Recovery.
- Navigating Self-Disclosure
- How Does the Neurobiology of Addiction Guide Choices for MAT?
- Appearance and Performance Enhancing Drugs: A Hidden Epidemic
- Clinical Application of Pharmacokinetics in Cannabis Use Disorder
- Role of Digital CBT and MAT to Improve Treatment of SUD
- Trauma Informed Care Amid Social Conflict
- Trauma-Integrated Addiction Treatment: What is it? What should it look like?
- Understanding Veterans and Unique Factors Contributing to SUD
- The Collective Power of Woman: Overcoming Shame and Trauma in SUD Treatment
- Rehabilitating Addiction Treatment: An Anti-Racist Recovery Approach
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- Dialectic Behavioral Therapy: Modifications for Co-occurring Disorders
- Demonstrating How to Help Clients Move from Economy Class to Flight Deck
- A Family Systems Approach to Treating Trauma and Addiction
- Latino-Informed Therapy Across the SUD & Addiction Continuum of Care Using SANITY Model
- Trauma, Addiction, COVID 19, Social Injustice
- The Art of the Progress Note: Where Law & Ethics Meet Efficiency
- Breaking Intergenerational Patterns of Addiction, Trauma, and Dark Secrets
- Coacher Vision
- Culturally Relevant Clinical Work in Addiction Treatment: Moving Beyond Cultural Competence
- Digital Technology to Measure, Monitor & Optimize Mental Health & Support Recovery
- Ethical Considerations for Recovery Coaches
- Relapse and Recycling Revisited
- Telehealth Best Practices Outline: COVID Clinical Issues & Documentation

On November 24th, 2020, the SCT Program Manager presented at the Behavioral Health Emergency Triage Network.
On November 19th, 2020, the SCT Program Manager presented at the Transition Project Banfield for shelter staff.
On October 13th, two BHU Clinicians, three BHRT officers, the SCT officer, and the BHU Lieutenant attended the Bybee Lakes Hope Center- Trauma Informed Care Training.
On October 6th, 2020, the SCT Program Manager presented to the Care Oregon, Unity, and Multnomah County Intensive Care Team.

2021 Q1 Update: The BHU continues to send BHU supervisors and BHRT members to crisis intervention, assessment and mental health trainings that are available through a variety of service providers. Training opportunities are based on availability of members, funding, and the impact on the BHU’s operational mission.

Trainings for this quarter that were attended by various members included:
- Various members of the BHU attended a United States Secret Service presentation on Averted School Attacks
- The SCT Program Coordinator attended Getting Started with DBT: An Overview (Dialectical Behavioral Therapy) on February 2nd.
- A BHU Clinician attended a OHSU Health Equity Symposium on February 10th.
- A BHU Clinician attended a Getting Started with DBT: An Overview (Dialectical Behavioral Therapy) class on February 12th.
- The SCT Program Coordinator attended Part Two: NAADAC/NCC AP Code of Ethics, Principle II CE Quiz on February 17th.
- On March 17th, the SCT Program Coordinator attended NAADAC Code of Ethics-VII Supervision and Consultation.
- On March 25th, the SCT Program Coordinator attended the Policing Innovation: Responding to People in Crisis: Alternative Models of Police Response.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
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Task Description
Utilize ECIT data proactively

Task Requirements:  MCPT shall utilize C-I Team data to proactively address mental health service, in part, by connecting recipients with service providers.

*NOTE: PPB refers to "C-I Team" as "Enhanced Crisis Intervention Trained officers" (ECIT officers)

Status Complete - review ongoing

Action Steps:
1. BHU will create an electronic referral system to help connect service recipients to service providers.
2. MCUs meet weekly with Project Respond supervisors to discuss and coordinate connecting recipients with appropriate services
3. Establish Behavioral Health Coordination Team (BHCT), comprised of community service providers and criminal justice representatives, as a forum to develop specific action plans for individuals that are having frequent police contact and are mentally ill
4. MCUs meet with the BHCT every other week to develop individual plans to connect consumers to appropriate resources

Task Date Completed: 9/12/2013

Received DOJ Approval?  Approval

Evidence of Completion:
1. BHU Electronic Referral System SOP (located in folder #92)
2. BHCT Attendance Roster
3. Example BHCT meeting agenda
4. Email from Dorothy Brown dated 9/12/13
5. Confidential BHCT Meeting Minutes available (upon request)

Status Note:
2014 Q1 Update: BERS operating. Weekly meetings continue each Friday with BHU, MCU and community providers in attendance to discuss treatment plans for clients

2014 Q2 Update: Data now obtainable through ECIT code is available to MCPT. When ECIT officer sends referral through BERS, BHU staff screen for assignment to MCU team.

2014 Q3 Update: MCPTs obtain info on ECIT calls and act on that info. Also utilize it in the coordination team meetings with partners to find appropriate treatment services.

2014 Q4 Update: The BHU continued to meet every Wednesday during the 4th quarter to discuss the BHRT caseload. These meetings serve as the platform for the BHU Coordination Team (BHUCT) meeting, held every other Friday. The BHU facilitated 6 BHUCT meetings. Referrals made by ECIT officers are evaluated and given higher priority for assignment to BHRT units to follow up.

2015 Q1 Update: The BHU met every Wednesday with the BHRTs and Cascadia supervisors to discuss referrals with whom the BHRTs are currently working. This meeting provides weekly coordination between law enforcement and the county mental health providers to develop strategies to connect the people referred to the appropriate services. The information from this weekly meeting is also utilized at the larger systems coordination meeting (BHUCT) which is held every other Thursday. The latter brings together numerous community partners to discuss strategies to guide people with mental illness who are having repeated contact with the criminal justice system into appropriate behavioral health services. This meeting also provides a forum for PPB and local behavioral health system stakeholders to discuss broader concerns or issues.

Multnomah County received a SAMSHA grant this quarter to support its Behavioral Health Treatment Court (MBHTC). The BHU is a member of the Community Coordination Council which will assist in the implementation of this grant. This council meets monthly to discuss referral processes and improvements to the county jail diversion programs. This meeting also lead to the discussion on additional resources that may be made available to police officers when seeking assistance for someone in crisis. The CATC currently has Justice Triage Beds that can accept people have contact with the criminal justice system and need assistance in getting connected to behavioral health services.

2015 Q2 Update: The BHU continues to participate on the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant. This grant provides input in developing a county systems-wide approach to serve individuals involved in the
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criminal justice system who have severe behavioral health disorders. The BHU hosts Behavioral Health Coordination Team meetings every other Thursday to collaborate on care plans for individuals with mental illness in the criminal justice system as well as identify and address ways to improve communication with system partners. Representatives from the following agencies attend the coordination team meeting:
• Multnomah County Mental Health and Addiction Services
• Cascadia Behavioral Health
• Multnomah County Detention Center Mental Health
• Mentally Ill Offenders Parole and Probation
• Multnomah County Department of Community Justice
• Veteran’s Affairs Police
• Outside In (homeless youth outreach)
• Multnomah County District Attorney for Mental Health Court
• Multnomah County Forensic Diversion
• Multnomah County Involuntary Commitment Program
• Forensic Assertive Community Treatment

2015 Q3 Update: The BHU continues to participate on the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant. This grant is designed to assist in developing a county system-wide approach to serve individuals involved in the criminal justice system who have severe behavioral health disorders.

The BHU met every Wednesday with the BHRTs and Cascadia supervisors to discuss referrals with whom the BHRTs are currently working. This meeting provides weekly coordination between law enforcement and the county mental health providers to develop strategies to connect the people referred to the appropriate services. The information from this weekly meeting is also utilized at the larger systems coordination meeting (BHUCT) comprised of PPB’s ongoing partners that is held every other Thursday. The latter brings together numerous community stakeholders to discuss strategies to guide people with mental illness who are having repeated contact with the criminal justice system into appropriate behavioral health services. This meeting also provides a forum for PPB and local behavioral health system representatives to discuss broader concerns or issues.

BHU Sergeants read every report that has a mental health component which is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT Templates. Officers are to complete the template if they use ECIT skills on a mental health crisis call whether it is their district call or they are dispatched to assist. The BHU Sergeants forward appropriate information gathered from these reports to the BHRTs and its Project Respond partners so that they can be fully informed and coordinate a suitable response.

2015 Q4 Update: The BHU continues to participate on the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant.

The BHU met every Wednesday with the BHRTs and Cascadia supervisors to discuss clients with whom the BHRTs are currently working. This meeting provides for regular coordination between law enforcement and the county mental health providers to develop strategies to connect individuals to the appropriate services. The information from this weekly meeting is also utilized at the larger systems coordination meeting (BHUCT) comprised of PPB’s ongoing partners that is held every other Thursday. The latter brings together numerous community stakeholders to discuss strategies to guide people with mental illness who are having repeated contact with the criminal justice system into appropriate behavioral health services. This meeting also provides an opportunity for PPB and local behavioral health system stakeholders to discuss broader concerns or issues.

BHU Sergeants read every report that has a mental health component which is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT Templates. The BHU Sergeants forward appropriate information gathered from these reports to the BHRTs and its Project Respond partners so that they can be fully informed and coordinate a suitable response.

2016 Q1 Update: The BHU continues to attend the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant.

The BHU met every Wednesday with the BHRTs and Cascadia supervisors to discuss clients with whom the BHRTs are currently working. This meeting provides for regular coordination between law enforcement and the county mental health providers to
develop strategies to connect individuals to the appropriate services.

The information from this weekly meeting is also utilized at the larger systems coordination meeting (BHUCT) comprised of PPB's ongoing partners and are held every other Thursday. The BHUCT brings together numerous community stakeholders to discuss strategies to guide people with mental illness who are having repeated contact with the criminal justice system into appropriate behavioral health services. This meeting also provides an opportunity for PPB and local behavioral health system stakeholders to discuss broader concerns or issues. BHU has recently started sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual’s BERS history and police contact history.

BHU Sergeants read every report that has a mental health component that is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT related data. The BHU Sergeants forward appropriate information gathered from these reports to the BHRTs and its Project Respond partners so that they can be fully informed and coordinate a suitable response.

BHU currently produces a BERS trend report. During this quarter we began to compile of list of community partners to share this with. This list should be complete in the next quarter and BHU will begin to send the BERS reports to our partners.

**2016 Q2 Update:**

The BHU continues to attend the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant.

The BHU met every Wednesday with the BHRTs and Cascadia supervisors to discuss clients with whom the BHRTs are currently working. This meeting provides for regular coordination between law enforcement and the county mental health providers to develop strategies to connect individuals to the appropriate services. The information from this weekly meeting is also utilized at the larger systems coordination meeting (BHUCT) comprised of PPB’s ongoing partners and are held every other Thursday. The BHUCT brings together numerous community stakeholders to discuss strategies to guide people with mental illness who are having repeated contact with the criminal justice system into appropriate behavioral health services. This meeting also provides an opportunity for PPB and local behavioral health system stakeholders to discuss broader concerns or issues. BHU has recently started sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a summary of an individual's BERS history and police contact history.

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BHU currently produces a BERS trend report. This quarter the BHU began to compile a list of community partners with whom to share this report. The list should be complete in the next quarter and distribution will begin.

At the Coordination Team Meeting on April 21, 2016, the BHU presented its findings on an analysis of the specific individuals who had been the subject of discussion in this group. The result shows a decrease in police contacts after this group has worked together to find an effective strategy.

**2016 Q3 Update:**

The BHU continues its participation on the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant.

The BHU met every Wednesday with the BHRTs and Cascadia supervisors to discuss clients with whom the BHRTs are currently working. This meeting provides for regular coordination between law enforcement and the county mental health providers to develop strategies to connect individuals to the appropriate services. The information from this weekly meeting is also utilized at the larger systems coordination meeting (BHUCT) comprised of PPB’s ongoing partners and are held every other Thursday. The BHUCT brings together numerous community stakeholders to discuss strategies to guide people with mental illness who are having repeated contact with the criminal justice system into appropriate behavioral health services. This meeting also provides an opportunity for PPB and local behavioral health system stakeholders to discuss broader concerns or issues. BHU has recently started sharing BERS related data with its partners in the BHUCT meetings. These “snapshots” provide a
BHU Sergeants make an effort to read every report that has a mental health component that is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT related data. The BHU Sergeants forward appropriate information gathered from these reports to the BHRTs and its Project Respond partners so that they can be fully informed and coordinate a suitable response.

BHU currently produces a BERS trend report. This quarter the BHU began to compile a list of community partners to share this with. This list should be complete in the next quarter and BHU will begin to send the BERS reports to our partners.

On September 28, 2016 the BHU presented an analysis at the BHU Advisory Committee. This analysis included information on mental health calls and offenses, ECIT information, and BERS related information.

2016 Q4 Update: The new mental health directive requires officers to notify the Multnomah County Call Center when they disengage from a mental health call. The BHU Lieutenant met with the Multnomah County Program Manager for Crisis Services. They determined what information would be beneficial to collect from officers and further discussed what follow-up may entail. The BHU has requested the County provide us with the case numbers of these calls and is still waiting for the county legal department to determine a process for this. The BHU Lieutenant and Crisis Service Program Manager also scheduled a standing monthly meeting to discuss how this process is working.

The BHU continues to attend the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant.

The BHU continues to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB’s ongoing partners and held every other Thursday.

BHU Sergeants make an effort to read every report that has a mental health component that is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT related data. The BHU Sergeants forward appropriate information gathered from these reports to the BHRTs and its Project Respond partners so that they can be fully informed and coordinate a suitable response.

BHU currently produces a BERS trend report. This quarter the BHU began to compile a list of community partners to share this with. This list should be complete in the next quarter and BHU will begin to send the BERS reports to our partners.

2017 Q1 Update: The new mental health directive requires officers to notify the Multnomah County Call Center when they disengage from a mental health call. The BHU Lieutenant met with the Multnomah County Program Manager for Crisis Services. They determined what information would be beneficial to collect from officers and further discussed what follow-up may entail. The BHU has requested the County provide it with the case numbers of these calls and is still waiting for the county legal department to determine a process for this. The BHU Lieutenant and Crisis Service Program Manager continue to meet monthly to discuss how this process is working.

The BHU continues to attend the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant. The BHU continues to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB’s ongoing partners and held every other Thursday.

BHU Sergeants make an effort to read every report that has a mental health component that is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT related data. The BHU Sergeants forward appropriate information gathered from these reports to the BHRTs and its Project Respond partners so that they can be fully informed and coordinate a suitable response.

BHU currently produces a BERS trend report. In order to share this information in a meaningful way with our community partners,
BHU has decided to present this report on a quarterly basis to the BHUAC. This will allow dialogue about the report with many of our community partners who are represented on the BHUAC. Due to the full agendas for BHUAC meetings in the first quarter of 2017, there was not time for a data presentation. This will be done in a future quarter.

Also, during this quarter, the BHU has begun to track calls for service at facilities which warrant a mandatory ECIT response. The BHU is exploring ways to share appropriate data with its community partners.

2017 Q2 Update:

The BHU continues to attend the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant.

The BHU continues to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB’s ongoing partners and held every other Thursday. BHU Sergeants make an effort to read every report that has a mental health component that is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT related data.

BHU currently produces a BERS trend report. In order to share this information in a meaningful way with our community partners, BHU has decided to present this report on a quarterly basis to the BHUAC. This will allow dialogue about the report with many of our community partners who are represented on the BHUAC.

Also, during this quarter, the BHU continued to track calls for service at facilities which warrant a mandatory ECIT response. The data identifies the number of calls for service along with the deviation from the average on a monthly basis. A protocol was developed to address facilities who may be identified as having an over-reliance on police services. This procedure is outlined in the memo “Procedures: Facilities” created by the BHU Lt. and sent to the BHU staff.

The BHU began tracking repeated contacts with individuals using data from calls codes as ECIT and from the mental health template. During this quarter another protocol was developed to assess if persons with repeated contacts had been referred to the BHU and a process to follow once this determination was made. This process is outlined in the memo “Procedures: Frequent Contact Referrals” created by the BHU Lieutenant and sent to the BHU staff. It uses ECIT data to proactively search for individuals who have had frequent contact, update or create a referral, and assess the need for BHRT follow up to connect the individual to services.

BHU will begin to share all referral information with Multnomah County Mental Health on a weekly basis. This process is outlined in the memo “Procedures: Crisis Line” created by the BHU Lieutenant and sent to the BHU staff.

The Portland Police Bureau revamped the way it collects mental health related data on calls to which a member responds. The new process was implemented in the 2nd quarter of 2017 and is two-fold. All officers are to answer whether there was “a subject with actual or perceived mental illness” on every call. ECIT officers are completing a mental health template on calls where they have used their ECIT skills. Non-ECIT officers will complete the template if they are completing a report related to the call. The data gleaned from this process began validation testing in 2017 Q2 and will be reported in subsequent quarters.

2017 Q3 Update:

A BHU representative attends the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant on a regular basis.

The BHU continues to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB’s ongoing partners and held every other Thursday. BHU Sergeants make an effort to read every report that has a mental health component that is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT-related data.

BHU currently produces a BERS trend report. In order to share this information in a meaningful way with community partners, BHU has decided to present this report on a quarterly basis to the BHUAC. This will allow dialogue about the report with many of
BHU is monitoring police calls-for-service at designated Portland-area mental health facilities. The data identifies the number of calls and any deviation from the average number of monthly calls. When high utilizers of police services are identified, the CIT Coordinator provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to attempt to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. It uses ECIT data to proactively search for individuals who have had frequent contact, update or create a referral, and assess the need for BHRT follow up to connect the individual to services.

BHU continued to share all referral information with Multnomah County Mental Health on a weekly basis.

During 2017 Q3, the BHU began tracking if any current or former BHU clients had any recent police contact. This procedure is outlined in the memo “Procedures: BERS Client Police Contact” created by the BHU Lt. and sent to the BHU staff.

**2017 Q4 Update:**

A BHU representative attends the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant on a regular basis.

The BHU continues to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB’s ongoing partners and held every other Thursday.

BHU Sergeants make an effort to read every report that has a mental health component that is routed to the BHU queue in PPB’s RMS. Some of these reports include ECIT-related data.

BHU currently produces a BERS trend report. In order to share this information in a meaningful way with community partners, BHU has decided to present this report to the BHUAC, when the agenda permits. This allows dialogue about the report with many of BHU’s community partners who are represented on the BHUAC.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. The data identifies the number of calls and any deviation from the average number of monthly calls. When high utilizers of police services are identified, the CIT Coordinator provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. It uses ECIT data to proactively search for individuals who have had frequent contact, update or create a referral, and assess the need for BHRT follow up to connect the individual to services.

BHU continued to share all referral information with Multnomah County Mental Health on a weekly basis. Furthermore, as noted previously, during the fourth quarter, the BHU began querying police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-referenced that information with the BHU Electronic Referral System (BERS). The goal is to identify gaps in the BHU system. If the identified individual has not been referred to the BHU, a BHU Sergeant or BHU staff member will then create a referral based on the information learned.

BHU has recently developed a partnership with Portland Fire and Rescue’s CHAT (Community Healthcare Assessment Team). BHU has been working with the CHAT team Coordinator on subjects who are high utilizers of the 911 system and/or generate frequent police contacts. Through this effort, they attempt to connect the person with mental health or other service providers.
**2018 Q1 Update:**
A BHU representative attends the Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant on a regular basis.

The BHU continues to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB's ongoing partners and held every other Thursday.

BHU currently produces a BERS trend report. In order to share this information in a meaningful way with community partners, BHU has decided to present this report to the BHUAC when the agenda permits. This allows dialogue about the report with many of BHU's community partners who are represented on the BHUAC.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. The data identifies the number of calls and any deviation from the average number of monthly calls. When high utilizers of police services are identified, the CIT Coordinator provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. It uses ECIT data to proactively search for individuals who have had frequent contact, create or update a referral, and assess the need for BHRT follow up to connect the individual to services.

BHU continued to share all referral information with Multnomah County Mental Health on a weekly basis.

PPB's Training Division and BHU partnered with Portland State University (PSU) and finished a project that examines police, community mental health, and community member interactions. One component of this project involves measuring officers’ effectiveness interacting with persons with mental illness, as well as their level of success interacting with staff at mental health facilities. This includes obtaining feedback from local mental health employees regarding their observations of police and community member interactions involving behavioral health crises and their experiences utilizing police services in their facilities.

Furthermore, the BHU continues to query police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-referenced that information with the BHU Electronic Referral System (BERS). The goal is to identify gaps in the BHU system. If the identified individual has not been referred to the BHU, a BHU Sergeant or BHU staff member will then create a referral based on the information learned.

**2018 Q2 Update:**
BHU representatives attended the monthly Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU met eight times this quarter with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB's ongoing partners and held every other Thursday.

BHU currently produces a BERS trend report which will be shared with BHUAC in the future.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. This averaged about 50 persons per week but most had already been referred to BHU.
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Further, the BHU continues to query police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-referenced that information with the BHU Electronic Referral System (BERS). The average is about 10 reports that indicate a referral will be made and most had made the referral.

2018 Q3 Update: BHU representatives attended the monthly Community Coordination Council for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU met eight times this quarter with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB's ongoing partners and held every other Thursday.

BHU's BERS trend report will be shared with BHUAC at a future meeting when the agenda allows.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. Also, the BHU continues to track the police contact of current and past referrals.

Further, the BHU continues to query police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-referenced that information with the BHU Electronic Referral System (BERS). The average is about 10 reports per week that indicate a referral will be made and the majority do in fact have a referral.

Also, the BHU has created a process to query mental health templates and see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the new BHRT 4 team.

2018 Q4 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU met eight times this quarter with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB's ongoing partners and held every other Thursday.

BHU's BERS trend report was shared with the BHUAC.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. Also, the BHU continues to track the police contact of current and past referrals. Further, the BHU continues to query police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-referenced that information with the BHU Electronic Referral System (BERS). The BHU continues to query mental health templates and see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the new BHRT 4 team.

2019 Q1 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU met eight times this quarter with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB's ongoing partners and held every other Thursday.

BHU's BERS trend report was shared with the BHUAC.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. Also, the BHU continues to track the police contact of current and past referrals. Further, the BHU continues to query police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-referenced that information with the BHU Electronic Referral System (BERS). The BHU continues to query mental health templates and see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the new BHRT 4 team.

2019 Q1 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health
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Treatment Court SAMSHA grant in this quarter.

The BHU met eight times this quarter with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB's ongoing partners and held every other Thursday.

BHU's BERS trend report is shared with the BHUAC on a requested basis.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. Also, the BHU continues to track the police contact of current and past referrals. Further, the BHU continues to query police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross referenced that information with the BHU Electronic Referral System (BERS).

The BHU continues to query mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the new BHRT 4 team.

2019 Q2 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU met ten times this quarter with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB’s ongoing partners and held every other Thursday.

BHU's BERS trend report is shared with the BHUAC on a requested basis.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls for-service and improve outcomes for persons in crisis.

The BHU continued tracking repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. Also, the BHU continues to track the police contact of current and past referrals. Further, the BHU continues to query police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross referenced that information with the BHU Electronic Referral System (BERS).

The BHU continues to query mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the new BHRT 4 team.

2019 Q3 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU continued to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is composed of PPB’s ongoing partners and held every other Thursday.

BHU's BERS trend report is shared with the BHUAC on a requested basis.

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BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU tracked repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. Also, the BHU continues to monitor the police contact of current and past referrals. Further, the BHU still queries police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-referenced that information with the BHU Electronic Referral System (BERS). The BHU continues to review mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the BHRT 4 team.

**2019 Q4 Update:** BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU continued to meet every Wednesday with the BHRTs and Cascadia supervisors to discuss clients. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is comprised of PPB’s ongoing partners and held every other Thursday.

BHU’s BERS trend report is shared with the BHUAC on a requested basis.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. When high utilizers of police services are identified, the CIT Coordinator contacts the facility and provides clarification and training in an attempt to educate staff on proper utilization of police services and expectations regarding police response. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU tracked repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. In addition, the BHU continues to monitor the police contact of current and past referrals.

**2020 Q1 Update:** BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant in this quarter.

The BHU continued to convene weekly Wednesday meetings with the BHRTs and Cascadia supervisors to discuss clients. Due to the COVID-19 pandemic, these meetings transitioned to web-based video meetings to accommodate remote working by some teams. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is comprised of PPB’s ongoing partners and held every other Thursday.

BHU’s BERS trend report is shared with the BHUAC on a requested basis. BHU planned to share this information at the February 2020 meeting, but it was canceled due to the COVID-19 pandemic. BERS trend data will be shared with the BHUAC in an upcoming quarter.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU tracked repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. In addition, the BHU continues to monitor the police contact of current and past referrals.

Friday, May 7, 2021
Further, the BHU still queries police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-references that information with the BHU Electronic Referral System (BERS). The BHU continues to review mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the BHRT-4 team.

2020 Q2 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant during this quarter.

The BHU continued to convene weekly Wednesday meetings with the BHRTs and Cascadia supervisors to discuss clients. Due to the COVID-19 pandemic and staffing issues (re: protests), these meetings transitioned to web-based video meetings to accommodate remote working by some teams. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is comprised of PPB's ongoing partners and held every other Thursday.

BHU's BERS trend report is shared with the BHUAC on a requested basis. BHU shared BERS trend data with the BHUAC during this quarter.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU tracked repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. In addition, the BHU continues to monitor the police contact of current and past referrals.

Further, the BHU still queries police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-references that information with the BHU Electronic Referral System (BERS). The BHU continues to review mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the BHRT-4 team.

2020 Q3 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant during this quarter.

The BHU continued to convene weekly Wednesday meetings with the BHRTs and Cascadia supervisors to discuss clients. Due to the COVID-19 pandemic and staffing issues (re: protests), these meetings transitioned to web-based video meetings to accommodate remote working by some teams. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is comprised of PPB's ongoing partners and held every other Thursday.

BHU's BERS trend report is shared with the BHUAC on a requested basis.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU tracked repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. In addition, the BHU continues to monitor the police contact of current and past referrals.

Further, the BHU still queries police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-references that information with the BHU Electronic Referral System (BERS). Moreover, the BHU developed a process to query calls for service and remarks stated in those calls for service to see if anyone on the call (officer, dispatcher, other entity, etc.) indicated the BHU will be contacted or a BHU referral has been made. That information is then cross-referenced with the BHU’s information/referral system.

The BHU continues to review mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the BHRT-4 team.
2020 Q4 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant during this quarter.

The BHU continued to convene weekly Wednesday meetings with the BHRTs and Cascadia supervisors to discuss clients. Due to the COVID-19 pandemic and staffing issues (re: protests), these meetings transitioned to web-based video meetings to accommodate remote working by some teams. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is comprised of PPB’s ongoing partners and held every other Thursday.

BHU's BERS trend report is shared with the BHUAC on a requested basis.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU tracked repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. In addition, the BHU continues to monitor the police contact of current and past referrals.

Further, the BHU still queries police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-references that information with the BHU’s information/referral system. BHU is now querying calls for service and remarks stated in those calls for service to see if anyone on the call (officer, dispatcher, other entity, etc.) indicated the BHU will be contacted or a BHU referral has been made. That information is then cross-referenced with the BHU’s information/referral system.

The BHU continues to review mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the BHRT-4 team.

2021 Q1 Update: BHU representatives attended the monthly Community Coordination Council meetings for the Multnomah Behavioral Health Treatment Court SAMSHA grant during this quarter.

The BHU continued to convene weekly Wednesday meetings with the BHRTs and Cascadia supervisors to discuss clients. Due to the COVID-19 pandemic and staffing issues (re: protests), these meetings transitioned to web-based video meetings to accommodate remote working by some teams. The BHRT teams have begun to transition back in to the office. These meetings may be held in person in the future. The information gleaned from this meeting is also utilized at the larger systems coordination meeting (BHUCT), which is comprised of PPB's ongoing partners and held every other Thursday.

BHU's BERS trend report is shared with the BHUAC on a requested basis.

BHU continues to monitor police calls-for-service at designated Portland-area mental health facilities. The goal is to reduce inappropriate police calls-for-service and improve outcomes for persons in crisis.

The BHU tracked repeated contacts with individuals using data from calls coded as ECIT and from the mental health template. In addition, the BHU continues to monitor the police contact of current and past referrals.

Further, the BHU still queries police reports to determine if officers have indicated that a BERS referral has been made or that BHU has been notified and cross-references that information with the BHU’s information/referral system. BHU continues to query calls for service and remarks stated in those calls for service to see if anyone on the call (officer, dispatcher, other entity, etc.) indicated the BHU will be contacted or a BHU referral has been made. That information is then cross-referenced with the BHU’s information/referral system.

The BHU continues to review mental health templates to see if the subjects involved indicated that they are “homeless”, “houseless”, and or “unsheltered”. This information is then passed on to the BHU sergeants, due to the fact that, the dedicated BHRT homeless outreach team was dissolved.
### Task Description
Development of policies related to transfer of custody/voluntary referral

### Task Requirements:
PPB, with the advice of the Addictions and Behavioral Health Unit Advisory Committee, shall develop policies and procedures for the transfer of custody or voluntary referral of individuals between PPB, receiving facilities, and local mental health and social service agencies. These policies and procedures shall clearly describe the roles and responsibilities of these entities and of MCPT officers in the process.

### Status
Actively in Process

### Action Steps:
1. PPB will review current practice contained in policy
2. BHU will explore what, if any, legal barriers exist to impede any referral or transfer
3. BHU will seek appropriate remedy to identified problems with changes in policy, if required

### Task Date Completed:

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<tr>
<th>Received DOJ Approval?</th>
<th>Approval</th>
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### Evidence of Completion:

#### Status Note:
2016 Q3 Update: This issue is being addressed incrementally in anticipation of the opening of the Unity PES. The pertinent Oregon Administrative Rule has gone through the required Rules Advisory Council (RAC) process for an amendment to allow secure transport agencies including ambulances and EMTs, rather than law enforcement, to transport persons who have been placed on a police hold or a director's hold to the PES or appropriate ER for care and treatment.

DOJ has approved PPB's Directive 850.20 and is currently reviewing 850.21, .22 and .25. Where necessary, PPB will revise those directives to comport with the new procedures related to PPB's role vis a vis the Unity Center at a time closer to its opening, currently scheduled for January 2017.

2016 Q4 Update: This issue is being addressed incrementally in anticipation of the opening of the Unity PES. The pertinent Oregon Administrative Rule has gone through the required Rules Advisory Council process for an amendment to allow secure transport agencies including ambulances and EMTs to transport persons who have been placed on a police hold or a director's hold to the PES or appropriate ER for care and treatment.

PPB is awaiting acceptance letters from DOJ on Directives 850.21, .22 and .25. Where necessary, PPB will revise those directives
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to comport with the new procedures related to PPB's role vis-à-vis the Unity Center at a time closer to its opening, currently scheduled for January 2017.

PPB has amended the Peace Officer Custody form required by O.R.S. 426.228 to include information requested by the PES medical staff and is currently working on an electronic delivery method for this document.

2016 Q4 Update: The suite of mental health directives was approved by the Department of Justice. Those directives addressed the issue of the transfer of custody of patients to AMR. However, the policies have not yet been enacted as the Bureau has to time their implementation with the opening of the Unity Center (PES), which is anticipated in January 2017.

Neither the AMR nor PES are currently equipped or trained to accept electronic delivery of the Police Officer Custody form, so the Bureau will provide a hardcopy to the AMR driver and PES until further notice.

The Behavioral Health Unit Advisory Committee added this topic to the list of agenda items it wished to discuss in 2017.

2017 Q1 Update: The pertinent PPB mental health directive related to the transfer of custody still awaits enactment as the Unity Center is not yet fully operational and ready to accept AMR transports. It opened in early February for walk-ins and transfers from partner emergency departments but does not have the necessary medical staff yet to take patients brought by ambulance 24/7.

2017 Q2 Update: On May 2, 2017, the Bureau enacted the three outstanding mental health-related directives: 850.21, .22 and .25. The enactment of these policies had been delayed while awaiting the opening of Unity Center’s Psychiatric Emergency Services (PES) unit for ambulance transports rather than just walk-ins and transfers from other hospitals. AMR is now providing the transport of all individuals on civil holds to either Unity’s PES or another hospital’s emergency department if the person does not pass medical clearance. However, PPB officers will still write the holds, when appropriate, on the triplicate forms that have been provided to all precincts as well as provide scene safety.

2017 Q3 Update: Julianna Wallace, Director of Non-Emergency Services at Unity, presented an update on the Unity Center to the BHUAC. She is working on collecting data so that they will be able to evaluate their numbers in a year and figure out what the baseline is for their service. She stressed the Center's goals of removing police from the business of transporting persons in behavioral health crisis, utilizing trauma-informed, recovery centered treatment; providing 24/7 access to psychiatric care; and assuring culturally competent care.

She explained the protocol for transport by AMR/EMS. There are specific medical criteria for admission as Unity is not set up for acute medical or trauma patients, acute intoxications or drug/alcohol withdrawal, abnormal vital sign or physical findings, or some chemically restrained patients. If the patient does not meet this criteria, they are sent to a regular ED.

2017 Q4 Update: PPB and BHU are developing an update on transfer of custody procedures, roles, and responsibilities with AMR, which will be completed in the first quarter of 2018.

2018 Q1 Update: PPB and BHU continue to work with AMR to develop a training update on transfer of custody procedures and the roles and responsibilities of AMR and PPB in these cases.

2018 Q2 Update: PPB and BHU continue to work with AMR to develop a training update on transfer of custody procedures and the roles and responsibilities of AMR and PPB in these cases.

2018 Q3 Update: PPB and BHU continue to work with AMR on transfer of custody procedures and the roles and responsibilities of AMR and PPB in these cases. The PPB has designated a liaison Sergeant at each precinct to respond to any problems in this regard in real time. No major problems were identified this quarter.

2018 Q4 Update: PPB and BHU continue to work collaboratively with AMR when issues arise on the roles and responsibilities of AMR and PPB in these transport cases. The PPB has designated a liaison Sergeant at each precinct to respond to any problems in this regard in real time.

2019 Q1 Update: PPB and BHU continue to work collaboratively with AMR when issues arise on the roles and responsibilities of AMR and PPB in these transport cases. The PPB has designated a liaison Sergeant at each precinct to respond to any problems in this regard in real time.
2019 Q2 Update: PPB and BHU continue to work collaboratively with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB has designated a liaison Sergeant at each precinct to respond to any problems in this regard in real time.

The issue of “medical holds” arose this quarter and several productive discussions ensued to resolve the problem.

2019 Q3 Update: PPB and BHU work collaboratively with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB has designated a liaison Sergeant at each precinct to respond to any problems in this regard in real time.

2019 Q4 Update: PPB and BHU continue to work with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB continues to have a designated liaison Sergeant at each precinct to respond to any problems in this regard in real time.

BHRT Officer Bryson organized and facilitated a meeting between BHU and the Legacy Health System ED Practice Council regarding the work of the BHU and more specifically the Behavioral Health Response Teams (BHRTs). The meeting served as a great educational opportunity and a chance for BHU officers and clinicians to interface with social workers operating in local EDs and discuss ways to improve communication and improve client outcomes.

BHU Lieutenant Hettman attended a coordination meeting with Legacy Health System leadership and security to discuss challenging cases and find ways for future communication improvements and overall efficiencies.

2020 Q1 Update: PPB and BHU continue to work with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB continues to have a designated liaison Sergeant at each precinct to respond to any problems in this regard in real time.

The BHU Lieutenant initiated a conversation with management of the Unity Center regarding the development of a training video to be produced for ultimate dissemination to all PPB members. The video will cover topics such as voluntary vs. involuntary treatment arrangements and other pertinent topics that relate to officers arranging appropriate care for community members at their facility.

2020 Q2 Update: PPB and BHU continue to work with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB continues to have a designated liaison Sergeant at each precinct to respond to any problems in this regard in real time.

2020 Q3 Update: PPB and BHU continue to work with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB continues to have a designated liaison Sergeant at each precinct to respond to any problems in this regard in real time.

2020 Q4 Update: PPB and BHU continue to work with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB continues to have a designated liaison Sergeant at each precinct to respond to any problems in this regard in real time.

On October 22, 2020, a number of Command-level PPB members met with AMR management, as well as local mental health partners, and county officials to discuss ongoing trends with behavioral health transports.

2021 Q1 Update: PPB and BHU continue to work with AMR when issues arise on the roles and responsibilities of each in these transport cases. The PPB continues to have a designated liaison Sergeant at each precinct to respond to any problems in this regard in real time.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
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Task Description
SCT shall continue to service dual-diagnosis individuals with criminal records

Task Requirements:
The Service Coordination Team ("SCT"), or its successor, shall serve to facilitate the provision of services to individuals who interact with PPB that also have a criminal record, addictions, and highly acute mental or physical health service needs.

Task Date Completed:
5/31/2013

Received DOJ Approval?
Approval

Evidence of Completion:
1. IGA Central City Concern FY13-14
2. IGA Multnomah County/Volunteers Of America FY13-14
3. City Budget FY13-14
4. SCT Org Chart
5. SCT Eligibility Criteria
6. SCT Program Flow Chart
7. SCT Program Manual 2013-2014
8. SCT SOP

Status Note:
2014 Q1 Update: SCT continued to operate as designed during the quarter.
2014 Q2 Update: SCT continued to serve the designated population. It held a graduation ceremony on June 26, 2014 for 19 successful participants.
2014 Q3 Update: SCT continued to serve its designated population.
2014 Q4 Update: The mission of SCT remained the same this quarter. There were 89 different individuals served by the SCT program. Fifty-six people “exited” the program. Forty-nine percent of the referrals made to the SCT program were from the District Attorney’s Office.
2015 Q1 Update: The SCT program has expanded its connections with ED diversion programs within OHSU, Legacy, Multnomah County and Family Care Health Plans. These programs seek alternative resources for high utilizers of emergency medical services. The overlap in client profiles creates a natural referral stream into SCT services when appropriate and available.

In addition, significant progress has been made toward the expansion of the Service Coordination Team. A proposal has been formalized that would increase the capacity of the program in both addictions treatment and engagement of mentally ill and dually diagnosed individuals.

The program expansion would add six behavioral health stabilization beds to the current program structure. These beds would allow the BHU to more ably address the needs of those with higher acuity mental illness and co-occurring disorders by creating a direct housing resource for the BHRTs. Access to stabilization beds would be an invaluable tool for intervention and engagement as evidenced by SCT’s previous experience. Providing persons in crisis a stable place to land can significantly change the outcomes of these interactions.

In addition, such individuals often require a higher level of care than the current program model is designed to provide. In these cases, access to behavioral stabilization beds would allow an uninterrupted opportunity to connect to appropriate mental health systems. Further enhancements would be made to the current SCT model through:
- Additional outreach
- Increased addictions services for women
- Culturally specific services

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- Extended treatment (Suboxone & pain management)
- Expanded use of peer mentors

The proposed expansion will not require additional funding but rather reallocation of current funding.

2015 Q2 Update:
Starting FY 2015-16, the Service Coordination Team will increase the capacity of the program in both addictions treatment and engagement of mentally ill and dually diagnosed individuals. The expansion did not require additional funding, but reallocated the entire SCT budget to Central City Concern. This shift ended funding to VOA when the current IGA expired. BHUAC voted in support of the proposed expansion. City Council approved the proposal/ordinance on June 25, 2015.

SCT will add six behavioral health stabilization beds to the current program structure. These beds will allow the BHRTs to assertively address the needs of those with higher acuity mental illness and co-occurring disorders by creating a direct housing resource for the BHRTs. Such access should be an invaluable tool for intervention and engagement as individuals referred to the BHRTs often experience periods of unstable housing during times of crisis. This will provide a stable place to land which will hopefully significantly change the outcomes of these interactions. In addition, SCT participants living with dual diagnosis or exhibiting higher acuity symptoms of mental illness often require a higher level of care than the current program model is designed to provide. In these cases, access to behavioral stabilization beds will allow uninterrupted access to services and an opportunity to connect to appropriate mental health systems.

Enhancements will also be made to the current SCT model through:
- Enhanced outreach
- Increased addictions services for women
- Culturally specific services
- Extended treatment (Suboxone & pain management)
- Domestic Violence treatment
- Expanded use of peer mentors

SCT Program Manager will be involved in the development and implementation of the six behavioral stability beds as well as managing new partnerships with the addiction treatment provider, Central City Concern.

2015 Q3 Update:
The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, medical care, employment and addiction and mental health treatment services. Engagement activities include outreach on the street and in jail, hospitals, detox centers, and other community agencies to offer SCT services and provide a smooth transition to SCT housing without returning to homelessness. Service Coordination Team Officer and Central City Concern Outreach Case Manager also work as a team to identify and offer services as part of street outreach. They also focus on educating community providers (shelters, treatment programs…) about the SCT program and referral process.

SCT has supported the increase in the hiring and utilization of Peer Mentors to support SCT participants in the engagement stage, providing basic needs, transportation to appointments, pro-social activities, connection to the recovery community, and life skills.

Partnership with Central City Concern Recovery Center (CCCRC) has enriched SCT services by providing gender and culturally specific addiction treatment, domestic violence treatment, and access to Suboxone and pain management services. CCCRC and the Housing Rapid Response staff are represented at the weekly SCT referral meeting to coordinate best care for the SCT participants.

Central City Concern/Housing Rapid Response continues to develop the six-bed behavioral health stabilization program. Central City Concern is currently in the process of hiring staff, developing program guidelines, and renovating the rooms and staff office. Program eligibility criteria was presented and approved by BHU Advisory Council on 8/26/15. These beds will allow the BHRTs to assertively address the needs of those with higher acuity mental illness and co-occurring disorders by creating a direct housing resource for the Behavioral Health Response Teams.

2015 Q4 Update:
The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing,
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intensive case management, medical care, and addiction and mental health treatment services. The SCT model is designed to address the high-needs of the participants throughout the stages of the program. Engagement activities include outreach on the street, jail, hospitals, detox centers, and other community agencies to offer SCT services and provide a smooth transition to SCT housing without returning to homelessness. The SCT Officer and Central City Concern (CCC) Outreach Case Manager work as a team to identify and offer services as part of street outreach. They also focus on educating community providers (shelters, treatment programs, etc) about the SCT program and referral process.

Utilization of Peer Mentors throughout the program help to provide basic needs, system navigation, transportation to appointments, participation in pro-social activities, connection to the recovery community, and life-skill building. Participants give back to the community by participating in formal volunteer activities and are assigned an Employment Specialist. Participants work with a Housing Specialist to address barriers in transitioning to permanent housing. Supportive services continue for a year after transitioning to permanent housing.

Partnership with Central City Concern Recovery Center (CCCRC) has enriched SCT services by providing access to gender and culturally specific addiction treatment, domestic violence treatment, and Suboxone and pain management services. CCCRC and the Housing Rapid Response staff are represented at the weekly SCT referral meeting to coordinate best care for the current and potential SCT participants.

Central City Concern/Housing Rapid Response has implemented the Supportive Transitions and Stabilization (STS) program. The six beds allow the Behavioral Health Response Teams to assertively address the needs of those with mental illness and co-occurring disorders who temporarily require a more extensive level of care by creating a direct housing resource. STS provides low barrier housing, intensive case management, and peer support services. STS addresses basic needs, transportation, access to health care, provides referrals to appropriate mental health and addiction treatment, connection to outside recovery communities, housing and income barriers. Formal STS referrals were considered on 11/30/15, with first bed utilization on 12/16/15. STS Program Supervisor is a representative at the Service Coordination Team referral meeting weekly for coordination of care for potential and current participants.

2016 Q1 Update:

The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, and addiction and mental health treatment services. The SCT model is designed to address the high needs of the participants throughout the stages of the program. Engagement activities include outreach on the street, jail, hospitals, detox centers, and other community agencies to offer SCT services and provide a smooth transition to SCT housing without returning to homelessness. SCT Officer and Central City Concern Outreach Case Manager work as a team to identify individuals and offer services as part of street outreach. They also focus on educating community providers (shelters, treatment programs…) about the SCT program and referral process.

Utilization of Peer Mentors throughout the program helps to provide basic needs, system navigation, transportation to appointments, participation in pro-social activities, connection to the recovery community, and life-skill building. Participants give back to the community by participating in formal volunteer activities and are assigned an Employment Specialist. Participants work with a Housing Specialist to address barriers in transitioning to permanent housing. Supportive services continue for a year after transitioning to permanent housing.

Partnership with Central City Concern Recovery Center (CCCRC) has enriched SCT services by providing access to gender and culturally specific addiction treatment, domestic violence treatment, and Suboxone and pain management services. CCCRC and the Housing Rapid Response (housing) staff are represented at the weekly SCT referral meeting to coordinate best care for the potential and current SCT participants.

Central City Concern/Housing Rapid Response has implemented the Supportive Transitions and Stabilization (STS) program. The six beds allow the Behavioral Health Response Teams to assertively address the needs of those with higher acuity mental illness, co-occurring disorders, and unstable housing by creating a direct housing resource. STS addresses basic needs, transportation, access to health care, provides referrals to appropriate mental health and addiction treatment, connection to outside recovery communities.
housing and income barriers. Formal STS referrals were considered on 11/30/15, with first bed utilization on 12/16/15. STS Case Manager assists clients with daily needs, navigation of the Mental Health and Health Services systems, and screens potential clients Mon-Fri from 8:00am – 4:00, and Intake from 8:00-2:00pm. This will streamline the intake process, and will help triage and address mental health, addiction and homelessness in a timely manner. Peer Support Specialists introduce participants to the recovery community, Dual Diagnosis support groups, and other mental health support agencies and groups. STS participants are included in the community meals and activities provided in the building which promotes pro-social interactions with others. STS Program Supervisor is a representative at the Service Coordination Team referral meeting weekly for coordination of care for potential and current participants. STS Program Supervisor and SCT Program Manager meet regularly to discuss any policy and/or procedure changes.

The grant agreement was amended in order to expand existing resources, ultimately creating at least 8 low-barrier beds that are connected to supportive services and SCT may have access to in the future. The Mayor was in full support of the amendment, which will be contributing in a small way to the solution of the Housing Emergency in Portland.

2016 Q2 Update: Service Coordination Team (SCT) honored 31 graduates from the program at City Hall on 5/26/16. Speakers included a SCT Alumni, Mayor Charlie Hales, and Portland Police Assistant Chief Robert Day. Each present graduate spoke about their participation in the program and their journey in the recovery process. It was a very moving ceremony for all.

SCT Program Manager conducted outreach to several service agencies in order to provide participants access to additional services. This included: Oregon Judicial Department’s Responsible Parent program, Metropolitan Public Defender’s Clean Slate program, Multnomah County Mental Health and Addictions, DePaul Treatment Center, Outside In, Central City Concern Eastside Concern, and Transition Projects Inc.

The grant agreement was amended in order to extend the current grant until October 31, 2016. Service Coordination Team is in the process of converting the grant to a service contract through a Request for Proposal. The extension will avoid a gap in services until the RFP process is complete and the new service contract executed.

2016 Q3 Update: The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services. The SCT model is designed to address the high-needs of the participants throughout the stages of the program. Engagement activities include outreach on the street, jail, hospitals, detox centers, and other community agencies to offer SCT services and provide a smooth transition to SCT housing without returning to homelessness. SCT Officer and Central City Concern Outreach Case Manager work as a team to identify and offer services as part of street outreach. They also focus on educating community providers (shelters, treatment programs…) about the SCT program and referral process.

Utilization of Peer Mentors throughout the program help to provide basic needs, system navigation, transportation to appointments, participation in pro-social activities, connection to the recovery community, and life-skill building. Participants give back to the community by participating in formal volunteer activities and are assigned an Employment Specialist. Participants work with a Housing Specialist to address barriers in transitioning to permanent housing. Supportive services continue for a year after transitioning to permanent housing.

Partnership with Central City Concern Recovery Center (CCCRC) has enriched SCT services by providing access to gender and culturally specific addiction treatment, domestic violence treatment, and Suboxone and pain management services. CCCRC and the Housing Rapid Response (housing) staff are represented at the weekly SCT referral meeting to coordinate best care for the potential and current SCT participants.

Central City Concern/Housing Rapid Response has implemented the Supportive Transitions and Stabilization (STS) program. The six beds allow the Behavioral Health Response Teams to assertively address the needs of those with higher acuity mental illness, co-occurring disorders, and unstable housing by creating a direct housing resource. STS addresses basic needs, transportation, access to health care, provides referrals to appropriate mental health and addiction treatment, connection to outside recovery communities, housing and income barriers. STS Case Manager and SCT Program Manager worked together to streamline the screening and
intake process, which will help triage and address mental health, addiction and homelessness in a timely manner. Peer Support Specialists introduce participants to the recovery community, Dual Diagnosis support groups, and other mental health support agencies and groups. STS participants are included in the community meals and activities provided in the building which promotes pro-social interactions with others. STS Program Supervisor is a representative at the Service Coordination Team referral meeting weekly for coordination of care for potential and current participants. STS Program Supervisor and SCT Program Manager meet regularly to discuss any policy and/or procedure changes.

One note regarding the STS beds; in QTR 3 of 2016, one bed in a double occupancy room was taken off-line due to systemic barriers. This count utilized for this quarter's analysis included five beds for 77 days and 6 beds for 15 days. In the future, this count will only use a 6 bed count.

The program opened the Recovery Empowerment Center, which is a space separate from the housing units for SCT participants to utilize for pro-social activities, education/life-skill groups, community events, and Alumni functions. The grand opening was on 7/14/16 and SCT Manager was invited to speak to highlight the history and evolution of the program.

SCT Program Manager conducted outreach/networking to several service agencies in order to provide participants access to additional services. This included: Multnomah County Mental Health Jail transition counselor, Multnomah County Public Defender’s Office/Clean Slate Program, Oregon Health & Science University New Directions Program, Multnomah County Mental Health & Addictions Culturally Specific Clinical Services, Multnomah County Mental Health & Addictions Exceptional Needs Care Coordinator.

SCT Program Manager and SCT Officer accompanied a staff from the City Budget Office to a community event for the SCT participants. Program Manager also met with City Commissioner Fritz to provide overview and updates on the SCT. SCT Program Manager, SCT Officer, and two SCT graduates presented, “Breaking the Cycle of Addiction and Criminality,” at the Regional CIT Conference in Tacoma, WA. The SCT graduates are also employed by our contracted agency.

The RFP process was completed this quarter, converting the current SCT grant agreement into a service contract. The next steps include presenting the award decision to City Council and developing the final contract, which are both done through Procurement. The new contract will start 11/1/16.

2016 Q4 Update: The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services. See detailed program description in previous quarterly reports.

Central City Concern/Housing Rapid Response continues to operate the Supportive Transitions and Stabilization (STS) program. See detailed program description in previous quarterly reports.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Central City Concern Sobering, CHIERS, Hooper Detox, and the Recuperative Care Program, Law Enforcement Assisted Diversion, and participated in the Safety and Justice Challenge Networking meeting in Seattle, WA.

SCT Coordination Team Meeting’s long time representative from Portland Patrol Inc.(PPI)/Clean and Safe retired this quarter but was replaced by the President of PPI. Two officers from PPB bike patrol are also representing at the Coordination Team Meeting, since they provide numerous referrals to the program.

City Council authorized the three-year service contract, but the final contract is still being developed by Procurement. The new contract began 11/1/16. The service contract was awarded via a RFP process.

2017 Q1 Update: The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services. See detailed program description in
Procurement continues to work with Central City Concern on the formal contract, although it is not signed by all parties. SCT Program Manager will provide final contract, with signatures, in the supporting documents in the quarter it is completed.

Central City Concern/Housing Rapid Response continues to operate the Supportive Transitions and Stabilization (STS) program. See detailed program description in previous quarterly reports.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Central City Concern Old Town Recovery, DePaul Treatment Center, Bellevue WA (presentation and tour), Multnomah County Addictions/African-American culturally specific services, Treatment on Demand, Portland Business Alliance, Multnomah County Health Department, Oregon Health & Science University (OHSU) care management team, and Folktime. SCT Program Manager also attends several community events involving current participants and alumni. This included a client art event and a recovery basketball tournament.

SCT Program Manager works in collaboration with the Law Enforcement Assisted Diversion (LEAD) Program Manager and team. Although a different program, with different treatment modalities and services, there is an overlap of possible clientele. The LEAD program will refer clients to SCT when clients have identified a desire for housing and addiction treatment. LEAD does not have formal housing or treatment services attached to their program. The LEAD Program Manager has attended the SCT meeting to learn about SCT as a whole and the structure of our collaboration team. SCT Program Manager is a participant in the LEAD coordination meeting twice a month.

2017 Q2 Update: The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services. See detailed program description in previous quarterly reports. The final contract for FY16-19 has been completed.

SCT Program Manager collaborates with the Law Enforcement Assisted Diversion (LEAD) Program Manager and team. See detailed description in previous quarterly reports. LEAD does not have formal housing or treatment services attached to their program. SCT has served several LEAD individuals in the program to meet the individual’s needs. Due to this partnership, SCT Program Manager is a participant in the LEAD coordination meeting twice a month.

SCT Program Manager conducted outreach/networking to several agencies to offer program information and provide participants access to additional services. These included: Multnomah County START court; Multnomah County/Central City Concern Stabilization Treatment Program; Multnomah County Parole Transitions program; Metropolitan Public Defenders; Blanchet Farms; Hillsboro Police Department; CODA/University of Ireland; DePaul Treatment program; and CIT/Collier County, Florida. SCT Program Manager and SCT Officer also attended several community events involving current participants and alumni.

This quarter SCT Program Manager and BHU Data Analyst presented pertinent data for the annual Portland State University Capstone project. The executive report has not yet been finalized by PSU but will be available next quarter.

SCT Officer is conducting weekly outreach services in collaboration with the Central Neighborhood Response Team (NRT), with program staff. This is to assess and offer services to individuals that are generating multiple police calls in neighborhoods/businesses. Next step is to connect with East and North NRT.

2017 Q3 Update: This quarter, SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: SE Works, Sheriff Reese/County, Portland Business Alliance, Community Peace Collaborative Forum, Central City Concern Employment Access Center, and Clackamas Service Center.

The Central Precinct Commander, Central Captain, SCT Program Manager and SCT Officer, along with Central City Concern supervisors, conducted a tour of the SCT's operations for the staff of the Mayor's office. The team highlighted the sites of treatment programs, details of the programs and the various services provided.
CIT Coordinator, BHU Lieutenant, SCT Program Manager, and SCT Officer also attended an SCT summer BBQ for current participants in the program.

The 2017 Capstone executive report has been finalized by PSU. SCT Program Manager and Central City Concern Director will be reviewing, evaluating, and making recommendations based on conclusion of the report.

SCT Program Manager was invited and has been participating in a weekly conference for Summer Public Health, Safety, and Service Coordination by the JOINT Office of Homeless Services. This is a collaboration of service providers, law enforcement, ONI, City of Portland, Multnomah County, Parks, and ODOT and purpose is to offer directed services to homeless individuals prior to “clean-ups,” and/or areas which are generating multiple calls. It was decided this collaboration will continue on a weekly basis. SCT Officer continues to offer support to all Neighborhood Response Teams (NRT).

2017 Q4 Update:

The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services. See detailed program description in previous quarterly reports.

Central City Concern/Housing Rapid Response continues to operate the Supportive Transitions and Stabilization (STS) program. See detailed program description in previous quarterly reports.

SCT Program Manager works in collaboration with the Law Enforcement Assisted Diversion (LEAD) Program Manager and team. LEAD does not have formal housing or treatment services attached to their program. SCT has served several LEAD individuals in the program and LEAD and SCT work in collaboration to meet the individual’s needs. SCT Program Manager is a participant in the LEAD coordination meeting twice a month.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Community Peace Collaborative Public Forum, DePaul Treatment Quality Improvement, Public Health, Safety and Service coordination/JOINT Office, Law Enforcement Assisted Diversion meet and greet, Lake Oswego law enforcement, Lifeworks Treatment, Old Town Business Association, and Blanchet House.

SCT Program Manager and SCT Officer continue to work in collaboration with Law Enforcement Assisted Diversion (LEAD), Service Coordination weekly conference calls by the JOINT Office of Homeless Services, and Neighborhood Response Teams (see previous quarter reports).

SCT Program Manager has been a participant in the Downtown Public Safety Action Committee (DPSAC) for several years. DPSAC’s goal is to address public safety issues in the downtown core by collaborating with various partners. Current mission statement is: “The Public Safety Action Committee is a place for city residents, businesses, property owners, and local governments to be informed, be heard, and be engaged in finding new ways to ensure livability and public safety.” Partners include, but not limited to, Portland Police Bureau (Command staff, Central Neighborhood Response Team, Service Coordination Team), Park Rangers, Clean and Safe, Portland Patrol Inc., Portland Business Alliance, University of Oregon, Hilton, Office of Neighborhood Involvement, Multnomah County District Attorney, Julia West House, Mercy Corp, Friends of Riverplace, My Father’s House, Can We Help, Securitas, City of Portland Bureau of Internal Business Services, and Bill Natio Company.

BHU and SCT have started to produce a quarterly trend document that analyzes trends and outcomes for clients. The SCT hopes to present this data to its Coordination Team Meeting and also the BHUAC.

2018 Q1 Update:

The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services.
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It held a graduation ceremony at City Hall for the participants who completed the program. SCT honored 44 graduates and was joined by Chief Outlaw and Mayor Wheeler, who both congratulated participants for their dedication and hard work.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Transition Projects Inc., Portland Patrol Inc., Maybelle Center, City Team, Multnomah County Justice Reinvestment District Attorney, Prescott Terrace, Volunteer’s of America Men’s Residential Program, and Oregon Harbor of Hope.

SCT Program Manager and SCT Officer continue to work in collaboration with Law Enforcement Assisted Diversion (LEAD), the JOINT Office of Homeless Services, and Neighborhood Response Teams (see previous quarter reports).

2018 Q2 Update: SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Portland State University Capstone Study, Ventura Police Department, Tualatin High School Criminal Justice Career students, Gresham Police Department, Transitions Services Unit/Multnomah County, Oregon Health and Science University hospital social workers, Multnomah County Parole and Probation, Central City Concern Benefits & Entitlement Specialist Team.

Furthermore, the City of Portland’s FY2018-19 Budget re-establishes ongoing funding of $1.5 million for the Service Coordination Team to provide supportive housing, drug and alcohol treatment services, and employment readiness support for houseless persons. Ongoing resources were eliminated from this program late in the budget process last fiscal year. This action ensures continuation of the program servicing homeless persons with addictions and criminal history.

Portland State University conducted the 10th annual Capstone study on the Service Coordination Team this quarter. The final executive report has not yet been received.

Service Coordination Team was highlighted in this year’s Police Executive Research Forum/PERF. The report was focused on, “The Police Response to Homelessness.” This was completed after the PERF conference, attended by SCT Program Manager and Central Precinct Commander in Long Beach, CA.

2018 Q3 Update: The City of Portland’s FY2018-19 adopted budget also included an increase in the contract amount to expand STS services as well as inflation adjustment. Amendment to the contract is scheduled to be evaluated in Q3 through City Council.

SCT Program Manager and BHU Officer presented at the CIT International Conference in Kansas City, MO. Presentation was a detailed overview of the Service Coordination Team, “Breaking the Cycle of Addiction and Criminality.”

An SCT Graduate presented at the Mayor’s Community Forum regarding addiction and the criminal justice system.

2018 Q4 Update: SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: CIT Regional Conference, which included a presentation by SCT Program Manager and BHU Officer, Cascadia Intensive Street Outreach, Oregon Health and Science University nursing students, Old Town/China Town Business Association, and Transition Projects Street Outreach Team.

Further, the amendment to the budget for an increase in SCT services referenced last quarter was reviewed and approved by City Council.

2019 Q1 Update: The Service Coordination Team (SCT) continues to serve its designated population. The Supportive Transitions and Stabilization program has been increasing its capacity since the beginning of the fiscal year. This quarter, a 9th bed was added to the program, but it will not be occupied until Q2.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Central City Concern Old Town Clinic/Recovery Center, SAMHSA SSI/SSDI Outreach, Access, and Recovery/SOAR, LukeDorf/WA County, Central City Concern Benefits and Entitlements Specialist Team/BEST, Street Roots, CODA, Inc, Multnomah County Mental Health and Addiction, Portland Integrated Networking Group, and Portland Patrol, Inc.
Portland State University 2018 Capstone study, which evaluates the Service Coordination Team program annually, has been completed and is available for review.

**2019 Q2 Update:** The Service Coordination Team (SCT) continues to serve its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services. The Supportive Transitions and Stabilization (STS) program has increased its capacity, but is still working on adding three additional rooms to the program.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Multnomah County Exceptional Needs, Independent Peer Review, Rainer Springs Hospital, Portland Business Alliance, Arnold Foundation, Multnomah County STOP Court Parole and Probation, and San Diego Deputy District Attorney. To strengthen partnership, SCT conducted a meet and greet with STS staff and BHU.

SCT Program Manager, BHRT officer/clinician team, and Central City Concern conducted a tour for Commissioner Hardesty and her staff of the SCT/STS program, providing an overview of the program. This included time to ask questions and hear stories of former graduates.

Portland State University 2019 Capstone study, which evaluates the Service Coordination Team program annually, has been completed and SCT is awaiting the final executive report.

SCT partnered with Urban League, Transition Projects, and Law Enforcement Assisted Diversion (LEAD) to conduct outreach and offer services weekly in specific drug-affected areas.

The Service Coordination Team contract between Central City Concern (CCC) and PPB/City of Portland expired this fiscal year. SCT Program Manager, CCC Management, and several participants and graduates presented to City Council at the budget hearing. The graduates shared their story and journey of recovery through the program. In attendance in the audience were graduates, current participants, and staff. It was a powerful moment at City Council, which ended in a unanimous vote to extend the contract for three years. However, the official contract has not yet been finalized.

**2019 Q3 Update:** The Service Coordination Team (SCT) still serves its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services. The Supportive Transitions and Stabilization (STS) program has increased its capacity.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Frequent Utilizer System Engagement (FUSE), Central City Concern Blackburn Center, Oregon Psychiatric Physicians Public Safety/Mental Health conference, PCCEP/MH Subcommittee, law enforcement and clinicians from Savannah, Georgia, BHU/Rainer Hospital tour, Central City Concern Old Town Recovery Center, Quest Center for Integrative Health, New River District Navigation Center, and Cascadia.

To strengthen partnerships, SCT conducted two meet and greet sessions between Central City Concern and Central Precinct Officers. BHU also attended an annual BBQ, hosted by our partners at Central City Concern for their clients.

SCT held a graduation ceremony at City Hall for the participants who completed the program. SCT honored 33 graduates and was joined by Chief Outlaw, Mayor Wheeler and Commissioner Fritz, who congratulated our participants for their dedication and hard work. The Master of Ceremonies for the event was a former SCT Graduate.

SCT Program Manager, BHU CIT Coordinator, BHRT Officer and Clinician were presenters at the CIT International Conference in August 2019.

Portland State University 2019 Capstone study, which evaluates the Service Coordination Team program annually, has been
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completed and the final executive report is in review.

The Service Coordination Team contract between Central City Concern (CCC) and PPB/City of Portland has been extended for three years. The contract is finalized and signed.

2019 Q4 Update: The Service Coordination Team (SCT) still serves its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services.
SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: Marion County Law Enforcement Assisted Diversion/LEAD, Collective Medical Tech, Transition Projects, SAFE’s shelter, San Mateo, CA, CODA, Native American Rehabilitation Association (NARA), and Providence Hospital/Better Outcome.
Internally, SCT Program Manager joined the Community Homeless Liaison on a ride-along with North Precinct Street Crimes Unit and partnered with a BHU Officer to provide a tour and overview of SCT/BHRT/local service providers to new recruits.

SCT Program Manager conducted a tour of the program to staff from the Office of Management and Finance (OMF), who will be highlighting SCT in their upcoming newsletter.
SCT formal presentations this quarter included: Metropolitan Public Defenders, Central City Concern Old Town Clinic staff, Inn of the Courts, New recruit tour, Police Budget Advisory Committee, and Homeless Alcohol and Drug Intervention Network/HADIN and was on a panel discussion, hosted by Oregon Supreme Court Justice Nelson, regarding police response to drug use and addiction.

Portland State University 2019 Capstone study, which evaluates the Service Coordination Team program annually, has been completed and the final executive report is in review.

The SCT Officer position was posted this quarter and staff is currently in the process of interviewing for the open position.

2020 Q1 Update: The Service Coordination Team (SCT) still serves its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services.

SCT Program Manager conducted outreach/networking to several agencies in order to offer program information and provide participants access to additional services. This included: River District Navigation Center, Sheriff’s Office/Close Street Supervision, Mult. County Sheriff’s Office/Navigation team, Transition Projects, Metropolitan Public Defenders, and Mike Schmidt, who is running for District Attorney.

SCT formal presentations this quarter included: Human Services Research Institute, North Precinct Neighborhood Response Team, National Institute of Justice (tour), Joint Task Force for Homelessness, Center for Court Innovation/New York, and Central City Concern Supportive Housing.

PPB still awaits Portland State University's 2019 Capstone study which evaluates the Service Coordination Team program annually.

BHU/SCT conducted interviews and hired Officer Joshua Sparks to fill the open SCT Officer position. Officer Sparks has been working in partnership with SCT in his previous position with the Street Crimes Unit. He has years of experience working with the SCT population and is a natural fit for this position.

2020 Q2 Update: The Service Coordination Team (SCT) still serves its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services although it was challenging this quarter.

SCT Program Manager typically conducts outreach/networking to several agencies in order to offer program information and provide participants access to additional services. Due to limitations with COVID, the SCT Program Manager focused on strengthening existing partnerships.

Friday, May 7, 2021
SCT Program Manager and SCT Officer continues to focus on increasing PPB referrals from patrol. This includes providing SCT information to precincts, specialty units and patrol officers. We have also created a communication loop to locate individuals and provide follow up with referral source.

Due to procedures and restrictions during COVID, SCT saw a decrease in referrals this quarter. Directed outreach from multiple providers were put on hold and/or limited interactions with potential referrals. Treatment providers discontinued individual and group meetings, providing telecare with only current clients. Probation Officers are teleworking with limited interaction with assigned caseload.

Due to logistical issues on the part of Portland State University's 2019 Capstone Study, the final executive report was delayed longer than expected. PPB has been working diligently with the capstone professor to ensure accuracy and consistency in the evaluation of the Service Coordination Team. The final report will be submitted this quarter.

2020 Q3 Update:

The Service Coordination Team (SCT) still serves its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services although it was challenging this quarter.

SCT Program Manager typically conducts outreach/networking to several agencies in order to offer program information and provide participants access to additional services. Due to limitations with COVID, the SCT Program Manager focused on strengthening existing partnerships.

SCT Program Manager and SCT Officer continue to focus on increasing PPB referrals from patrol. This includes providing SCT information to precincts, specialty units and patrol officers. We have also created a communication loop to locate individuals and provide follow up with referral source. The SCT Program Manager and SCT Officer provided referral and program overview in ECIT in-service this quarter.

Due to procedures and restrictions during COVID, SCT saw a decrease in overall referrals this quarter, although have increased referrals from Multnomah County Sheriff’s Office and working diligently to provide continuity of care from custody to SCT services. Directed outreach from multiple providers were put on hold and/or limited interactions with potential referrals. Some treatment providers have slowly implemented small groups and individual counseling, although still limited. Telecare continues to be available to clients, but SCT clientele have limited capacity/access to appropriate telecommunication. Probation Officers are continuing to telework with limited interaction with assigned caseload.

Due to logistical issues on the part of Portland State University's 2019 Capstone Study, the final executive report was delayed longer than expected. The executive report has been finalized and included in Q3 reports.

2020 Q4 Update:

The SCT program manager was a participant in the National Association for Alcohol and Drug Addiction Counselors virtual conference 8/24-8/26. Provided a variety of addiction-focused topics for continuing education.

The Service Coordination Team (SCT) still serves its designated population, providing access to supportive housing, intensive case management, medical care, addiction and mental health treatment services although it was challenging this quarter.

SCT Program Manager typically conducts outreach/networking to several agencies in order to offer program information and provide participants access to additional services. Due to limitations with COVID, the SCT Program Manager focused on strengthening existing partnerships. SCT Program Manager presented and shared the Q3 SCT Trend Analysis Report to the Service Coordination partners.

SCT Program Manager and SCT Officer continue to focus on increasing PPB referrals from patrol. This includes providing SCT information to precincts, specialty units and patrol officers. We have also created a communication loop to locate individuals and provide follow up with referral source.

Due to procedures and restrictions during COVID, SCT saw a decrease in overall referrals this quarter compared to same quarter.
last year. SCT continues to see an increase in referrals through the Multnomah County Sheriff’s Office and working diligently to
to provide continuity of care from custody to SCT services. Directed outreach from multiple providers were put on hold and/or limited
interactions with potential referrals. Some treatment providers have slowly implemented small groups and individual counseling,
although still limited. Telecare continues to be available to clients, but SCT clientele have limited capacity/access to appropriate
telecommunication. Probation Officers are continuing to telework with limited interaction with assigned caseload.

During the Fall Budget Monitoring Process/BMP, the Mayor’s office proposed moving the SCT contract under the JOINT Office
of Homeless Services. Council approved this amendment, although the changes would not take effect until FY21-22.
Amendment reads:
“Amend Exhibit #2 to include the following Current Appropriation Level Target adjustment:
Decrease the CAL Target for the Portland Police Bureau by $2,307,654 for the housing and services contract currently managed by
the Service Coordination Team. Increase the CAL Target by $2,307,654 plus inflation in the Portland Housing Bureau for the Joint
Office of Homeless Services to take over ownership of this contract.”

*Note: the amount on the original proposal was $2.3 million, but was amended at the last minute to $2.1 million, which is the
correct amount of the SCT contract.

PPB, the Mayor’s office and the JOINT Office of Homeless Services will need to meet in this next quarter to discuss the logistics
of managing the SCT contract from a different city bureau.

2021 Q1 Update: The Service Coordination Team (SCT) still serves its designated population, providing access to supportive housing, intensive case
management, medical care, addiction and mental health treatment services although it was challenging this quarter.

Due to procedures and restrictions during COVID, SCT continues to see a decrease in overall referrals this quarter compared to
same quarter last year, but consistent with last quarter. SCT continues to see an increase in referrals through the Multnomah
County Sheriff’s Office and is working diligently to provide continuity of care from custody to SCT services. Treatment providers
and outreach are continuing to provide more direct services, although still in limited capacity.

SCT Program Manager typically conducts outreach/networking to several agencies in order to offer program information and
provide participants access to additional services. Due to limitations with COVID, the SCT Program Manager focused on
strengthening existing partnerships and connecting virtually with agencies locally and nationally. SCT Manager and/or SCT
Officer conducted presentations to: Center for Court Innovation/New York, Multnomah County District Attorney’s Strategic
Prosecution Unit, Portland Business Alliance, Portland Rescue Mission, Portland Committee on Community-Engaged Policing,
OHSU New Directions/Social Workers, Native American Rehabilitation Association/NARA, Bybee Lakes Board member, Public
Safety Coordinating Council, Frequent Users System Engagement/FUSE, Frontline Services PDX and BHUAC Community
meeting.

SCT Program Manager presented and shared the Q4 SCT Trend Analysis Report to the Service Coordination partners.

SCT Program Manager has been invited to participate in the newly formed Prosper Portland Public Health and Safety meeting as
well as the Behavioral Health Emergency Coordination Network Criminal Justice sub-committee.

PPB, SCT, Central City Concern and the JOINT Office of Homeless services have been meeting to discuss the logistics of the
Mayor’s office decision to move the SCT contract to the JOINT Office.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

Friday, May 7, 2021
Task Description: Call Triage for Mental Health Issues

Task Requirements: Per DOJ - BOEC and PPB, with the advice of the Addictions and Behavioral Health Unit Advisory Committee, shall complete policies and procedures to triage calls related to mental health issues, including changes to protocols for assigning calls to Multnomah County Crisis Call Center, and adding new or revised policies and protocols to assign calls to the PPB ABHU or directly to NGOs or community-based mental health professionals.

Status: Actively in Process

Action Steps: 1. BHU will facilitate meetings with Multnomah County, BOEC, and PPB personnel and command staff to discuss call types that will be assigned to Multnomah County Crisis Call Center.

Evidence of Completion: 1. Meeting on 3/1/13 and 6/3/13
2. BOEC SOP 20.10.200

Task Date Completed: Received DOJ Approval?

2014 Q1 Update: BOEC provided copy of its protocol for calls to MCCL as well as its ECIT Dispatch and Referral Process
2014 Q2 Update: BOEC continues to use the procedures developed to triage calls. No new or revised protocols implemented this quarter.
2014 Q3 Update: BOEC continues to utilize the established protocols to dispatch ECIT to calls or refer persons to the Crisis Call Center
2014 Q4 Update: BOEC transferred 124 calls to the Multnomah County Crisis Line (MCCL) in the fourth quarter of 2014.
2015 Q1 Update: There were 123 calls transferred by BOEC to the Multnomah County Crisis Line (MCCL) in this quarter.
2015 Q2 Update: No new or revised policies or procedures were implemented this quarter. BOEC transferred 92 calls to the Multnomah County Crisis Line in this time period.
2015 Q3 Update: BOEC transferred 94 calls to the Multnomah County Crisis Line in this time period.
2015 Q4 Update: It is PPB’s understanding that BOEC will report on its own action items at this point.
2016 Q1 Update: Please note: BOEC authored this update but PPB agreed to include it in the overall quarterly report for the convenience of all parties.
2016 Q2 Update: Please note: BOEC authored this update but PPB agreed to include it in the overall quarterly report for the convenience of all parties.

Friday, May 7, 2021
policies and procedures were reviewed and approved by the BHUAC in accordance with Task 113.

2016 Q3 Update: It is PPB's understanding that BOEC will report on its own action items at this point.
2016 Q4 Update: It is PPB's understanding that BOEC will report on its own action items.
2017 Q1 Update: It is PPB's understanding that BOEC will report on its own action items.
2017 Q2 Update: It is PPB's understanding that BOEC will report on its own action items.
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2018 Q1 Update: It is PPB's understanding that BOEC will report on its own action items.
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2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
Task Description

BOEC Dispatch Training

Task Requirements: The City will complete training of all BOEC Dispatchers in Crisis Triage. The City, with the advice of the ABHU Advisory Committee, shall develop ongoing training for BOEC Dispatchers.

Status Actively in Process

Action Steps:
1. BHU will meet and regularly work with the BOEC Leadership to co-develop crisis triage training protocols and curriculum for BOEC Dispatchers

Evidence of Completion:

Task Date Completed:

Received DOJ Approval? Approval

Status Note:

2014 Q1 Update: No additional training conducted this quarter--anticipate a semi-annual or annual basis based on BOEC's staff turnover.

2014 Q2 Update: No additional training held this quarter.

2014 Q3 Update: No additional training held this quarter. Confirmed dates for next quarter.

2014 Q4 Update: BOEC is an essential partner of the Enhanced Crisis Intervention Team (ECIT) and Behavioral Health Response Team (BHRT) program. BOEC members need to understand the organization and mission of the Behavioral Health Unit (BHU) in order to dispatch ECIT and BHRT resources to the appropriate police calls. To that end, the BHU Sergeant, CIT Coordinator, and Crime Analyst presented at BOEC In-Services on October 20-21 and November 7-8, 2014.


2015 Q2 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2015 Q3 Update: No training for BOEC staff was conducted by BHU this quarter.

2015 Q4 Update: No training of BOEC staff was conducted by BHU this quarter.

2016 Q1 Update: Pleasenote: BOEC authored this update but PPB agreed to include it in the overall quarterly report for the convenience of all parties.

BOEC began planning for the CIT training for Dispatchers to be delivered this fall. BOEC will be creating training in partnership with the Portland Police Bureau and the Oregon Department of Public Safety Standards and Training.

2016 Q2 Update: Please note: BOEC authored this update but PPB agreed to include it in the overall quarterly report for the convenience of all parties.

In preparation for its upcoming CIT training, BOEC initiated a workgroup to help guide the development of training specific to dispatchers. BOEC is also seeking feedback and assistance from PPB CIT trainers so that the training provided is seamless for the responding officers. BOEC is currently working towards having the first round of training for supervisory staff in August. The remaining staff will receive the 8 hour training* in October and November when staffing and workload issues allow for training.

*BOEC is bound by the current labor contract which limits Inservice Training to 8 hours every six months. 16 hours of training was initially planned pending new contract language. Unfortunately, negotiations are ongoing so the new language has not been ratified.

2016 Q3 Update: It is PPB's understanding that BOEC will report on its own action items at this point.

2016 Q4 Update: It is PPB's understanding that BOEC will report on its own action items.

Friday, May 7, 2021
2017 Q1 Update: It is PPB’s understanding that BOEC will report on its own action items.

2017 Q2 Update: BOEC conducted seven hours of training for all Dispatchers in April and May. This training is the second part of the series which began in Fall 2016. To date, all certified call takers and dispatchers (total = 108) have completed 15 hours of CIT training. An additional one (1) hour review will be conducted via computer self-study by the end of Q3.

2017 Q3 Update: BHU staff participated in the CIT training that BOEC conducted this quarter for its call takers and dispatchers.

2017 Q4 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2018 Q1 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2018 Q2 Update: It is PPB’s understanding that BOEC will report on this action item.

2018 Q3 Update: No additional training for BOEC staff was conducted by BHU this quarter but there is training scheduled for October.

2018 Q4 Update: BHU staff did conduct the BOEC CIT for Dispatchers’ training that took place on October 2 and 3, 2018.

2019 Q1 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2019 Q2 Update: BOEC provided 10 sessions of training in April 2019. One hundred twenty-four (124) people attended.

BOEC also hosted a 2-day training in June for 10 recently hired employees who had not received the CIT training. The agency hosts these periodically to ensure all staff have the CIT for Dispatcher training. Related to that training, BOEC administered an attitude questionnaire before and after training. Overall, an increase in empathy was noted as a result of the training.

Finally, we provided an evaluation to the participants in the two-day class. The training was well received.

2019 Q3 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2019 Q4 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2020 Q1 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2020 Q2 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2020 Q3 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2020 Q4 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2021 Q1 Update: No additional training for BOEC staff was conducted by BHU this quarter.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Department of Justice Tasks / Quarterly Update Report

**Task Description**
Fully Operational Crisis Triage

**Task Requirements:** City shall ensure Crisis Triage is fully operational to include the implementation of the policies and procedures developed pursuant to the above paragraph and operation by trained staff.

**Status** Actively in Process

**Action Steps:**

**Task Date Completed:**

☐ Received DOJ Approval? Approval

**Evidence of Completion:**

**Status Note:**

2014 Q1 Update: Current staff fully trained and protocols in place to triage calls to appropriate place

2014 Q2 Update: BOEC staff is following the protocols created for triaging calls related to mental health issues.

2014 Q3 Update: Current BOEC staff is operating under the applicable policies and procedures.

2014 Q4 Update: BOEC continues to function under the established protocols. There were 124 calls transferred to the Multnomah County Crisis Line (MCCL) for the 4th Quarter of 2014

2015 Q1 Update: Protocols are being utilized. There were 123 calls transferred to the Multnomah County Crisis Line (MCCL) in the first quarter of 2015.

2015 Q2 Update: To the best of PPB's knowledge, BOEC continues to abide by the existing protocol. There were 92 calls transferred to the Multnomah County Crisis Line in this quarter.

2015 Q3 Update: To the best of PPB's knowledge, BOEC continues to abide by the existing protocol. There were 94 calls transferred to the Multnomah County Crisis Line in this quarter.

2015 Q4 Update: To the best of PPB's knowledge, BOEC continues to abide by the existing protocol. However, it is PPB's understanding that BOEC will report on its own action items now.

2016 Q1 Update: Please note: BOEC authored this update but PPB agreed to include it in the overall quarterly report for the convenience of all parties.

No updates. BOEC abides by the protocol.

2016 Q2 Update: Please note: BOEC authored this update but PPB agreed to include it in the overall quarterly report for the convenience of all parties.

Since the release of the updated policies and procedures, BOEC has significantly increased the number of calls identified for ECIT response. From January to March 31, 2016 – BOEC identified approximately 122 incidents for initial dispatch of ECIT responders. But from April 28, 2016 – June 30, 2016, BOEC identified approximately 488 incidents for initial dispatch of ECIT responders. BOEC believes this huge improvement is a direct result of updated policies and procedures. It anticipates that additional training will actually hone the skills of dispatchers so that they can better identify and capture information for responders.

2016 Q3 Update: It is PPB's understanding that BOEC will report on its own action items at this point.

2016 Q4 Update: It is PPB's understanding that BOEC will report on its own action items.

2017 Q1 Update: It is PPB's understanding that BOEC will report on its own action items.

2017 Q2 Update: It is PPB's understanding that BOEC will report on its own action items.

2017 Q3 Update: It is PPB's understanding that BOEC will report on its own action items.

Friday, May 7, 2021
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Department of Justice Tasks / Quarterly Update Report

Task Description
EIS Enhancements

Task Requirements: PPB will enhance its EIS to more effectively identify at-risk employees, supervisors and teams to address potentially problematic trends in a timely fashion.

See specific requirements in DOJ Agreement #116-117

Status: Actively in Process

Action Steps:
1. Update Directive 345.00 to account for the requirements of this provision.
2. Ensure that the EIS Administrator SOP includes the requirements of this provision
3. Release new policy and allow for comment

Task Date Completed: [ ] Received DOJ Approval? [ ] Approval

Evidence of Completion: 1. Revised Directive 345.00
2. EIS Administrator SOP #7111

Status Note: Friday, May 7, 2021

2014 Q1 Update: EIS administrator reviews Officers’ EIS records on regular basis; sends reports to supervisors

2014 Q2 Update: EIS administrator reviews officers' EIS records on regular basis; sends reports, as necessary, to supervisors. Also began analysis of data by precinct to compare patterns of activity. PSD drafting revised version of Directive to address DOJ requirements among other things.

2014 Q3 Update: EIS administrator continues to monitor the existing two thresholds and sends notice to supervisor when alert received on a subordinate.

EIS Directive 345.00 was posted for public comment on August 1, 2014 and is in Executive Reconciliation phase at the close of this quarter.

2014 Q4 Update: All policy and procedures concerning PPB’s Employee Information System (EIS) are covered in Directive 345.00 which was enacted on October 30, 2014.

Training for 163 of PPB’s 178 commanders and supervisors on the directive and the system it entails took place through the month of November. Part of the training included a hands-on exercise for participants to review the EIS record of all employees under their supervision and document that review in the Performance Discussion Tracker.

Of the 15 who did not attend, one has retired and the other fourteen's absences were vetted through their chain of command. A make-up training session is set for February 16, 2015.

EIS administrator now monitors three thresholds and sends notice to supervisor when alert is received on a subordinate.

He also has developed an auditing system to assure that supervisors review EIS for officers new to their command. This will be an ongoing activity with reports on a scheduled basis.

The 2014 EIS annual report will be issued shortly. It will contain data analysis about EIS usage.

2015 Q1 Update: All supervisors who did not attend a November EIS training session were trained this quarter as a make-up session was held on February 16, 2015 and Sgt. Jensen also provided individual lessons.

Compliance of Commanders and supervisors re: conducting timely reviews of officers new to their command averaged 49% for the 3 months this quarter. The compliance rate had declined for the first two months but came back up in March. The Professional Standards Division (PSD) recognizes that the compliance rates thus far have been unacceptable. An e-mail was sent to all supervisors reminding them to do their reviews as required, which is the latest of several e-mail communications on this subject.

In order to make the system of accountability more robust, PSD is implementing a more comprehensive follow-up system. If the required 116b review has not been completed within 21 days of the transfer, the PSD lieutenant will send an e-mail to the Responsibility Unit (RU) Manager reminding them of the required review. If the review is not done after 30 days, the PSD Captain will send an e-mail to the RU Manager requesting a formal explanation and that appropriate action be taken to correct the problem.

Additionally, EIS staff will meet with all lieutenants and above in the Operations Branch to address this issue as well as a wide

Friday, May 7, 2021
In February, a new methodology was approved for the analysis of units and supervisors to discern patterns of activity. A random sample of 6 units as defined by the Administrator and 6 supervisors will be analyzed each quarter. For this quarter, this cohort accessed EIS 142 days and made 130 entries in the aggregate.

**2015 Q2 Update:**  The second quarter saw a significant increase in compliance with this section of the Agreement. The compliance rate was 100% for April, 91% for May, and 100% for June. This is an overall compliance rate of 96% (108 out of a possible 113), which is a marked improvement over the overall compliance rate of 49% for the first quarter (34 out of a possible 69). This positive increase in the compliance rate can be traced directly to the more extensive e-mail reminder and follow-up system PSD implemented in April. If the required 116(b) review has not been completed within 21 days of the transfer, the PSD lieutenant sends an e-mail to the Responsibility Unit (RU) Manager reminding them of the required review. If the review is not done after 30 days, the PSD Captain sends a message to the RU Manager requesting a response and appropriate action be taken to correct the problem.

Additionally, the EIS administrators met with all lieutenants and above in the Operations Branch in June. They discussed a wide variety of EIS-related topics and emphasized the importance of compliance with timelines such as that in 116(b).

With regard to Item 116c, the methodology developed in February was again applied. The units and supervisors reviewed for this quarter showed a significant increase in EIS usage as compared to the first quarter, which is consistent with overall compliance reported above. For the second quarter, the selected 6 units and 6 supervisors (50% turnover from the first group) accessed EIS 82 days and made 110 entries in the aggregate. Although the raw numbers showed a small decrease, the units selected for the second quarter included fewer supervisors than those used in the first quarter. When looked at on a per-supervisor basis, the second quarter showed a decrease in the days the EIS was used per supervisor from 6.8 to 5.9 but an increase in entries made from 6.2 to 7.9. This means the average supervisor in the group examined made almost 8 entries in the quarter. The utility of this data remains questionable. The PPB looks forward to further discussions with the COCL in the near future regarding its utility in assessing the work of PPB.

In order to perform this check for compliance, the EIS Administrator obtained a list of all sworn members of Officer rank using the “Super Roster” function on the PPB Intranet. Employees with less than an 18 month tenure, and therefore still on a probationary status, were excluded from the list because they are supervised through the Training Division and evaluated at least monthly. This list was placed in seniority order, with 1 being the most senior officer and 613 being the officer who had most recently completed probation. The EIS Administrator then used a random number generator to obtain 50 numbers.

For each of the 50 numbers, the EIS Administrator located the corresponding officer on the numbered list. The EIS Administrator then checked EIS to see if there was an entry in the discussion tracker in the 2nd or 3rd quarter indicating an employee evaluation had been done. Employees who had such an entry were counted as being in compliance with this section, and employees who did not have an entry were counted as not being in compliance with this section.
Of the 50 employees checked, one was excluded because that employee is not subject to being evaluated. Of the 49 remaining employees, 38 had an entry in compliance with the above standard, making for a 77.6% compliance rate.

The third quarter saw the high rate of compliance with subsection (b) continue. The compliance rate was 94% for July, 92% for August, and 95% for September. This is an overall compliance rate of 94% (65 of 69 on time), which is a vast improvement over the 49% for the first quarter (34 on time out of a possible 69) and is nearly the same as the 96% last quarter (108 on time out of a possible 113). It is not realistic to expect 100% compliance every quarter, but an ongoing compliance rate of around 95% appears to be an attainable goal.

The continued higher compliance rate this quarter can be traced directly to the more extensive e-mail reminder and follow-up system PSD implemented at the beginning of the 2nd quarter. If the required 116b review has not been completed within 21 days of the transfer, the PSD lieutenant sends a reminder of the required review by e-mail to the Responsibility Unit (RU) Manager. If the review is not done after 30 days, the PSD Captain contacts the RU Manager requesting a response and that appropriate action be taken to correct the problem.

Subsection © requires data analysis of units and supervisors to identify and compare patterns of activity. The EIS administrator is not an analyst so the results presented are informational only. In February, a data analysis plan was approved that calls for a nonscientific, semi-random sampling of 6 units and 6 supervisors each quarter. The units and supervisors were selected at the time the plan was submitted for approval, with a 50% replacement rate each quarter. They have not and will not receive any advance notice that their activity is being reviewed.

Some terms were not explicitly defined in the DOJ Agreement. These terms were interpreted by the administrator until/unless they are formally defined. “Unit” has been defined as “a well-ordered group of sworn members.” For example, the afternoon shift at a precinct is a unit, as is only the members of that shift that work both Saturday and Sunday. This definition combines simplicity with a great deal of flexibility to adapt to changing conditions. “Supervisor” has been defined as “a sworn member to whom other sworn members report.”

The units and supervisors reviewed for this quarter showed a decrease in EIS usage as compared to the first two quarters of 2015. For the third quarter, 6 units and 6 supervisors (50% turnover from the second group) accessed EIS 72 days and made 72 entries in the aggregate. When looked at on a per-supervisor basis, the third quarter showed a decrease in days used per supervisor from 5.9 to 5.1, and a similar decrease in entries made from 7.9 to 5.1. This means the average supervisor in the group examined in this quarter made approximately 5 entries in the quarter. This decrease in numbers appears to be attributable to the types of units that were randomly selected. The units and supervisors examined for the third quarter had a higher proportion of specialty units than in past quarters. Specialty units function differently than patrol so there would be fewer opportunities to make these required entries.

**2015 Q4 Update:**

In order to perform this check for compliance, the EIS Administrator obtained a list of all sworn members of Officer rank using the “Super Roster” function on the PPB Intranet. Employees with less than 24 months’ tenure, and therefore either still on a probationary status or not far enough out from being off of probation to ensure they would have been subject to a routine employee evaluation, were excluded from the list because they are supervised through the Training Division and evaluated at least monthly. This list was placed in seniority order, with 1 being the most senior officer and 593 being the least senior officer. The EIS Administrator then used a random number generator to obtain 75 unique numbers between 1 and 593.

For each of the 75 numbers, the EIS Administrator located the corresponding officer on the numbered list and determined whether an evaluation would have been required (for example, officers on military leave or who work full time for the PPA are not required to have an evaluation). For the employees who are required to be evaluated, the EIS Administrator then checked EIS to see if there was an entry in the discussion tracker in the 3rd or 4th quarter indicating an employee evaluation had been done. Employees who had such an entry were counted as being in compliance with this section, and employees who did not have an entry were counted as not being in compliance with this section.

Of the 75 employees checked, one was excluded because that employee is not subject to being evaluated. Of the 74 remaining, 63
Department of Justice Tasks / Quarterly Update Report

had an entry in compliance with the above standard, which is an 85.1% compliance rate. This is a sizeable improvement over the 77.6% compliance rate from the 3rd quarter (38 completed reviews out of 49 possible reviews).

Item 116b:
The fourth quarter saw the high rate of compliance with this section of the Agreement continue. The compliance rate was 100% for October (24 on time out of a possible 24), 94% for November (15 on time out of a possible 16), and 78% for December (7 on time out of a possible 9). This is an overall compliance rate of 94% (46 on time out of a possible 49), which compares quite favorably to the overall compliance rate of 49% for the first quarter (34 on time out of a possible 69) and is nearly the same as the 96% in the second quarter (108 on time out of a possible 113) and the 94% last quarter (65 on time out of a possible 69). The total compliance rate for 2015 is 86% (258 on time out of a possible 300). Maintaining our current compliance rate seems realistic and attainable.

The significant increase in compliance rate can be traced directly to the more extensive e-mail reminder and follow-up system PSD implemented with the beginning of the 2nd quarter. If the required 116b review has not been completed within 21 days of the transfer, the PSD lieutenant sends an e-mail to the Responsibility Unit (RU) Manager reminding them of the required review. If the review is not done after 30 days, the PSD Captain contacts the RU Manager requesting a response and appropriate action be taken to correct the problem.

Item 116c:
PPB interprets that this section is designed to compare patterns of activity of EIS use among units and supervisors. For the fourth quarter, PPB redesigned its reporting process for this item. PPB agrees with the COCL that the information analyzed in the past was not providing significant value compared to the time it took to compile. After a series of discussions involving EIS staff and PPB’s internal DOJ compliance team, PPB decided to change the reporting to an analysis of the prior two items (116a and 116b) on a unit-and-supervisor basis. PPB is open to exploring other reporting schemes if COCL believes it would help bring PPB into substantial compliance with the Agreement.

Please note that the EIS Administrator is not trained in methods of analysis, so what follows is informational in nature. In the fourth quarter, there were 123 “opportunities for compliance.” That is, there were 123 instances inspected for compliance with the DOJ Agreement. Of those, 74 were compliance with section 116a, and 49 were compliance with section 116b. There were a total of fourteen instances of noncompliance with either Item 116a or Item 116b. Only one unit (as defined by UDAR groupings) had more than one instance of noncompliance. In order to determine the extent of noncompliance in this unit, the EIS files of all 15 officers assigned to the unit were reviewed. There were no EIS entries related to a personnel evaluation. In order to remedy this situation, the Administrator immediately sent an e-mail to the unit sergeants reminding them to make an entry when they do an evaluation. The Administrator’s chain of command was also notified in the event more extensive action is needed.

All units with at least 10 opportunities for compliance in the quarter reported 90% or better compliance: TOD (100%), East (96%), Central (93%), and North (90%). It appears that the incidents of noncompliance are isolated and, with the exception of the unit described above, not clustered in any one unit or supervisor.

Thus PPB identified an area where significant improvement must be made. PPB will report on the status of the unit described above in the first quarter of 2016 as to the corrective action taken and the corresponding result.

2016 Q1 Update: 116a:
In order to perform this check for compliance, the EIS Administrator obtained a list of all sworn members of Officer rank using the “Super Roster” function on the PPB Intranet. Employees with less than 24 months’ tenure, and therefore either still on a probationary status or within the first six months of permanent status and thus not yet subject to a routine employee evaluation, were excluded from the list because they are supervised through the Training Division and evaluated at least monthly. This list was placed in seniority order, with 1 being the most senior officer and 589 being the least senior officer. The EIS Administrator then used a random number generator to obtain 75 unique numbers between 1 and 589.

For each of the 75 numbers, the EIS Administrator located the corresponding officer on the numbered list and determined whether
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an evaluation would have been required (for example, officers on various kinds of extended leave or who work full time for the PPA are not required to have an evaluation). For the employees who are required to be evaluated, the EIS Administrator then checked EIS to see if there was an entry in the discussion tracker in the 4th quarter of 2015 or the 1st quarter of 2016 indicating an employee evaluation had been done in one of those quarters. Employees who had such an entry were counted as being in compliance with this section, and employees who did not have an entry were counted as not being in compliance with this section.

This review was completed on April 3, 2016. Of the 75 employees checked, one was excluded because that employee is not subject to being evaluated and three were excluded due to their extended leave status. Of the 71 remaining employees, 58 had an entry in compliance with the above standard, which is an 81.7% compliance rate. This compliance rate is approximately midway between the 77.6% compliance rate from the 3rd quarter of 2015 and the 86.5% compliance rate in the 4th quarter of 2015.

The unweighted average compliance rate for all three quarters is 81.9%. In order to improve the quality of evaluations and the compliance rate, in early April 2016 the PSD Captain sent an e-mail to all RU Managers emphasizing the importance of EIS reviews to completing a thorough evaluation and detailing a simple system that is likely to result in improved compliance over time.

116b:
The first quarter of 2016 saw the high rate of compliance with this section of the Agreement continue. The compliance rate was 99% for the quarter (38 reviews completed of 38 possible reviews in January, 18 of 18 in February, and 25 of 26 in March for a total of 81 of 82 in the quarter). This rate compares to a compliance rate of 94% (46 on time out of a possible 49) in the fourth quarter of 2015, 94% in the third quarter (65 on time out of a possible 69), 96% in the second quarter (108 on time out of a possible 113), and 49% for the first quarter (34 on time out of a possible 69). It is not realistic to expect 100% compliance every quarter, but maintaining a compliance rate of at least 90%, as we have for the past year, is realistic and attainable.

The significant increase in compliance rate can be traced directly to the more extensive e-mail reminder and follow-up system PSD implemented with the beginning of the 2nd quarter of 2015. If the required 116b review has not been completed within 21 days of the transfer, the PSD lieutenant sends an e-mail to the Responsibility Unit (RU) Manager reminding them of the required review. If the review is not done after 30 days, the PSD Captain sends to the RU Manager requesting a response and appropriate action be taken to correct the problem.

116c:
For the 4th quarter of 2015, PPB redesigned its reporting process for this Item and that reporting process continues for this quarter. PPB agrees with the COCL that the information analyzed in the past was not providing significant value compared to the time it took to compile. After a series of discussions involving EIS staff and PPB’s internal DOJ compliance team, PPB decided to change the reporting to an analysis of the prior two items (116a and 116b) on a unit-and-supervisor basis. PPB is open to returning to the prior reporting scheme if COCL believes this would help bring PPB into substantial compliance with the Agreement.

2016 Q2 Update:

Item 116a:
Officers were checked as before (see prior reporting for methodology). A sample of 75 officers was used, which is approximately 1 in 8 officers who were subject to evaluation for at least six months. Sergeants were checked for the first time this quarter, as they have now been subject to evaluation for over six months. The same general methodology was used as for officers (see prior reporting). A sample of 33 officers was used, which is approximately 3 in 10 sergeants who were subject to evaluation. A proportionally larger share of sergeants was chosen because of the smaller absolute number of sergeants. Additional ranks (lieutenant, detective, criminalist) will be checked as they become subject to evaluation for at least six months.

The compliance rate for officers, at 80.5%, was in line with prior results (3 of the 75 officers excluded for various reasons). A breakdown by branch and division is included in the supporting documentation. Of the sergeants subject to evaluation (1 sergeant—assigned to the PPA and therefore not subject to evaluation—was excluded), 53.1% were in compliance. The breakdown by branch and division for this is also included in the supporting documentation.

The overall compliance rate for this section (officers and sergeants combined) was 72.1%. Personnel assigned to the Operations and Community Services branches tend to have more exposure to EIS by virtue of the nature of their assignments, and the
compliance rate in these branches (77.9%) was markedly different from the other two branches (41.1%).

In order to improve the quality of evaluations and the compliance rate, in early April 2016 the former PSD Captain sent an e-mail to all RU Managers emphasizing the importance of EIS reviews to completing a thorough evaluation and detailing a simple system that is likely to result in improved compliance over time. Furthermore, PSD is planning to provide another training to supervisors when the revised version of Directive 345.00 is released. Reinforcing the message contained in the e-mail will be one point of emphasis in the training.

Item 116b:
Since implementing an e-mail reminder system early in the 2nd quarter of 2015, compliance with this section had been above 90% each quarter. This quarter’s compliance rate was 84%. Out of 69 possible reviews, 58 were completed on time (14 of 14 in April, 4 of 5 in May, and 40 of 50 in June). All but 1 of the out of compliance reviews have been completed as of 8/3/16. Of the 11 missed reviews, the ranks of the people required to do the reviews are as follows:
  - Sergeant: 1
  - ASII (Lieutenant equivalent): 1
  - Senior Business Operations Manager (RU Manager): 2
  - Captain: 3
  - Commander: 3
Two of the missed reviews (Senior Business Operations Manager) were by an employee who has never supervised sworn personnel and did not attend the EIS training for all sworn supervisors that was conducted in November 2014. These reviews were promptly completed (the same day) when the deficiency was brought to this employee’s attention.

The EIS Administrator has sent an e-mail to all sworn supervisors reminding them of the importance of timely reviews. Because the e-mail reminder system has proven generally effective at increasing compliance rates to acceptable levels, PPB believes this quarter’s results are an anomaly that will not be repeated going forward. PSD will be monitoring compliance rates with this section closely in the future to determine whether additional corrective action is necessary. Regardless of future compliance rates, the importance of doing these reviews will be addressed in the upcoming training.

Item 116c:
The methodology for reporting on this section remains the same. Please see prior quarterly reporting (2015 Q4) for a detailed explanation. However, in a recent meeting, DOJ and COCL seemed to imply that this section did not require reporting at all, but rather was intended to require a series of unit and supervisor level thresholds aimed at identifying, per COCL, “deviant supervisors.” Pending further discussion with DOJ and COCL, PPB will continue to use its historical interpretation.

In the second quarter, there were 173 “opportunities for compliance.” That is, there were 173 instances inspected for compliance with the DOJ Agreement. Of those, 104 were compliant with section 116a, and 69 were compliance with section 116b. The accompanying table (see supporting document) lays out compliance percentages by branch.

With one exception, all units with at least 10 opportunities for compliance in the quarter reported compliance rates higher than the Bureau average: North (100%), the Chief’s Office (100%), Traffic (91%), East (88%), and TOD (83%). The other unit (Central, 58%) was below the Bureau average, a result that was almost entirely driven by supervisors’ failure to document EIS reviews done in conjunction with sergeants’ personnel evaluations.

This quarter’s compliance rate was influenced by the addition of sergeants to the 116a evaluation reviews and the missed 116b reviews in June. Please see those sections for corrective action that PPB believes will effectively strengthen its oversight systems.

2016 Q3 Update: Item 116a:
Officers and sergeants were checked using the same sample size and methodology as in prior quarters (see prior reporting). Detectives were checked for the first time this quarter as they have now been subject to evaluation for over six months. The same general methodology was used as for other ranks. Because detectives perform non-supervisory duties, they were sampled at
approximately the same rate as officers. The 10 detectives that made up the sample compose approximately 1 in 7 eligible detectives. Additional ranks (lieutenant, criminalist, etc.) will be checked as they become subject to evaluation for at least six months. Supervisory ranks will be sampled at a higher rate than non-supervisory ranks due to the need to ensure accountability up the chain of command.

The compliance rate for officers was 70.4% (4 of the 75 officers excluded for various reasons). The compliance rate for sergeants was 48.5% (no sergeants excluded). The compliance rate for detectives was 40.0% (no detectives excluded). Please see the supporting documentation for a more detailed breakdown of results by division and detail.

The overall compliance rate for this section (all ranks combined) was 61.4%. Personnel assigned to the Operations Branch had a compliance rate of 71.6%. The remaining branches had a combined compliance rate of 46.6%. Please note that these compliance rates cannot be directly compared to the branch compliance rates provided in previous quarters due to an extensive restructuring of the Bureau that occurred just prior to the beginning of this quarter.

Item 116b:
This quarter’s compliance rate was 65%. Out of 105 possible reviews, 68 were completed on time (10 of 12 in July, 5 of 11 in August, and 53 of 82 in September). Of the 36 missed reviews, the ranks of the people required to do the reviews are as follows:
- Sergeant: 9
- Lieutenant: 21
- Captain: 1
- Commander: 2
- Assistant Chief: 3

The results achieved in this section, coupled with the results described in Section 116(a) above, are a significant cause of concern to PSD staff. PSD and the EIS Administrative Team will be working with the Chief’s Office, the Strategic Development Oversight Group, and the COCL over the course of the next quarters to design and implement an enhanced accountability, oversight and compliance system connected to the EIS software and usage.

Item 116c:
The methodology for reporting on this section remains the same. Please see prior quarterly reporting for a detailed explanation. Past conversations and DOJ’s recent Compliance Assessment point to continuing disagreement about the meaning of this provision of the Agreement. Pending further discussion with DOJ and COCL, PPB will continue to use its historical interpretation.

Please note that neither the EIS Administrator nor anyone on the EIS staff is trained in methods of analysis so what follows is informational in nature. In the fourth quarter, there were 219 “opportunities for compliance.” That is, there were 219 instances inspected for compliance with the DOJ Agreement. Of those, 114 were compliance with section 116a, and 105 were compliance with section 116b. The accompanying tables (see supporting document) lays out compliance percentages by precinct, division, and branch.

No precinct or division had a compliance rate above 90%, although some divisions or shifts that had eight or more opportunities for compliance had compliance rates above 85%—the Traffic Division, the Drugs and Vice Division, the afternoon shifts at Central Precinct, and the night shift at North Precinct.

PPB recently received feedback from DOJ that the information used to compile the Item 116(c) reporting could also be used to conduct a trend analysis for PPB’s precincts and divisions. Although EIS staff are not trained in analytical methods, we did use the data to create some graphical references that show how the information changes over time. Please see the supporting documentation for the graphs and underlying data.

The first comparison used overall compliance rates for Items 116(a), (b), and ©. This graph showed a decline in compliance over the past two quarters, reinforcing the need for additional training and communication regarding the importance of EIS use to both employee development and DOJ compliance.
The second comparison used compliance rates for reviews required by Item 116(a) broken down by reporting unit (generally precinct or division). Due to the fact that not all reporting units had employees sampled in all periods, differences in assignment, and regular transfers of personnel, no firm conclusions can be drawn from the information reviewed. The graph and associated data are provided for information only.

2016 Q4 Update:

Item 116a:
Officers, criminalist, detectives, and sergeants were checked using the same sample size and methodology as in prior quarters (see prior reporting). Criminalists were checked for the first time this quarter, as they have now been subject to evaluation for more than six months. The same general methodology, and sample size formula, was used for criminalists as for other ranks (see prior reporting). Criminalists make up the smallest ranked group reviewed for DOJ reporting, as there are a total of 16 criminalists in the Bureau. As such, and in keeping with the sample size formula, only 4 criminalists were selected for review. The 10 detectives that made up the sample comprise approximately 1 in 7 eligible detectives. Additional ranks (lieutenant, etc.) will be checked as they become subject to evaluation for at least six months. Supervisory ranks will be sampled at a higher rate than non-supervisory ranks due to the need to ensure accountability up the chain of command.

The compliance rate for officers was 72.2% (52/72), which was a slight increase from third quarter reporting of 70.4%. The compliance rate for detectives was 30.0% (3/10), down from 40% last quarter. The compliance rate for criminalists was 75.0% (3/4). The compliance rate for sergeants was 40.0% (14/35), which was a decrease from the 48.5% reported in Q3. Please see the supporting documentation for a more detailed breakdown of results.

The overall compliance rate, for all ranks reviewed for 116a, dropped slightly from last quarter (61.4%) to 59.5% (72/121) this quarter. Personnel assigned to the Operations Branch had a compliance rate of 69.0% (58/84), down from 71.6% in Q3. The remaining branches had a combined compliance rate of 37.8% (14/37), which was also down from third quarter reporting of 46.6%. However, please note that these compliance rates cannot be directly compared to the branch compliance rates provided in previous quarters due to an extensive restructuring of the Bureau that occurred just prior to the beginning of the third quarter of 2016.

Item 116b:
This quarter’s compliance rate for on time reviews was 88.7% (125/141); a considerable increase from the 65% reported in Q3. Out of 141 possible reviews, 125 were completed on time (31 of 40 in October, 40 of 43 in November, and 54 of 58 in December). All of the 16 missed or late reviews were reviews required to be done by a sergeant.

The low compliance rate (65%) in 2016 Q3 resulted in PSD stressing the importance of these reviews, with a corresponding increase in compliance in Q4 (particularly in the last two months). This issue will be reinforced at the 2017 supervisor’s in-service.

Item 116c:
The methodology for reporting on this section remains the same as previous quarters. Please see prior quarterly reporting for a detailed explanation.

In the fourth quarter, there were 262 “opportunities for compliance” inspected by the EIS Team for reporting with a 75.2% compliance rate (197/262). That is, there were 262 instances inspected for compliance with the DOI Agreement. Of those, 121 were compliance with section 116a and 141 were compliance with section 116b. Please see the supporting documents for compliance percentages by precinct and division.

Based on feedback from DOJ, we used the data to graph changes over time. Please see the supporting documentation for the graphs and underlying data.

The first graph displays overall compliance rates/percentages for Items 116(a), (b), and (c). There is a decline in compliance during the second and third quarters of 2016, clearly highlighting the need for additional training and communication regarding the importance of EIS use.
The second graph presents compliance rates/percentages for reviews required by Item 116(a) broken down by reporting unit (generally precinct or division). Due to the fact that not all reporting units had employees sampled in all periods (listed as N/A), differences in assignment, and regular transfers of personnel, no firm conclusions can be drawn from the information reviewed. The graph and associated data are provided for information only.

**2017 Q1 Update:**

There were notable changes made during this reporting period. First, PPB assigned a new lieutenant responsible for managing the EIS program and a new EIS Administrator charged with a complete analysis of our current processes. Second, the team is collecting data for alert analyses using all applicable members rather than a sample size so that PPB can more accurately describe the volume of compliance (or non-compliance) by RU. Third, the team has initiated a significant increase in the percentage of threshold alerts sent to the Rus for further review. Note: that percentage is expected to continue to grow each reporting period until all alerts, except clear system errors and alerts that have no new information (duplicates), are sent to the Rus for analyses and action.

Although the EIS Administrator completed a significant portion of alert reviews in the past, the new EIS team recognizes the value of a broader review of alert threshold breaks. They will be working closely with the COCL to develop a system of reviews that are meaningful and specifically targeted toward action plans.

Finally, the EIS Team created a lesson plan and power-point presentation that instructs supervisors and managers on what is required to comply with Directive 345.00 (EIS), as well as the value of closely supervising their charges. All sergeants and above are receiving this specialized training during the 2017 In-Service training.

The EIS Team continues to receive guidance from the COCL as well as internal stakeholders to drive policy, procedure, and software changes. The team looks forward to a more robust system that is beneficial to PPB employees and to the public they serve.

116(a):

With the addition of new members to the EIS Team, a new approach to 116a is being tested for this report. In past reporting, the EIS Administrator used a random number generator to create a “sample size” of each rank to check for compliance during a six month timeframe. Beginning with this reporting period (2017 Q1), the EIS Team has eliminated the “sample size” and has elected to check the compliance of all members with a required performance evaluation due in the first quarter of 2017. By eliminating the “sample size”, the EIS Team believes a more accurate picture of compliance can be reported. Whereas the number of officers checked for the 2016 Q4 report was 72, this quarters report will show a check of 363 officers (a 404% increase in records checked at this rank).

Although the increase in sworn members appears to be a more accurate method of reporting, this method was extremely time consuming and labor intensive, requiring the assistance of all four members of the EIS Team to complete the research. The EIS Team will be looking for ways to speed up this process by conducting the research of EIS of each month, but the labor required to conduct the research will remain the same and may lead to the “sample size” method being reinstated.

For this quarter the compliance rate for officers was 64.4% (230/357*), which was a decrease from 2016 fourth quarter reporting of 72.2%. The compliance rate for detectives was 36.40% (16/44*), up from 30% last quarter. The compliance rate for criminalists was 100.0% (7/7*), showing a significant increase from last quarter’s 75%. And the compliance rate for sergeants was 39.4% (28/71*), which was on par with the 40% reported in Q4. Please see the supporting documentation for a more detailed breakdown of results. (See 2017 Q1 – 116a Compliance – Officers, Criminalist, Detectives, Sergeants)

The overall compliance rate, for all ranks reviewed for 116a, increased slightly from last quarter (59.5%) to 60.9% (265/435*) this quarter. Members assigned to the Operations Branch had a compliance rate of 66.1% (218/330*), down from 69.0% in Q4. The compliance rates of the remaining Branches are as follows: Investigations Branch had compliance rate of 64.8% (35/54*), Services Branch compliance rate was 21.7% (10/46*), and the Chief’s Office complied at a rate of 40.0% (2/5). Please note, these compliance rates cannot be directly compared to the branch compliance rates prior to third quarter reporting of 2016 due to an extensive restructuring of the Bureau that occurred just prior to the beginning of the third quarter of 2016. Additionally, it is not known if the changes in compliance rates is related to the change in methodology or not.

116(b):

This quarter’s compliance rate for Transfer Reviews completed on time was up to 92.4% (73/79); which is a slight increase over the 88% in 2016 Q4 and a considerable increase from the 65% in 2016 Q3. Out of 79 possible transfer reviews, 73 were completed on time (33 of 34 in January, 19 of 22 in February, and 21 of 23 in March). Various sergeants were responsible for all six missed or late reviews.

Due to the low compliance rate in the third quarter of 2016 (65%), PSD begin stressing the importance and requirement of these reviews by sending follow-up emails and teaching at In-Service training. The increase in compliance in 2016 Q4, and again in 2017
This quarter’s compliance rate for Transfer Reviews completed on time was up to 92.4% (73/79); which is a slight increase over the 88% in 2016 Q4 and a considerable increase from the 65% in 2016 Q3. Out of 79 possible transfer reviews, 73 were completed on time (33 of 34 in January, 19 of 22 in February, and 21 of 23 in March). Various sergeants were responsible for all six missed or late reviews.

Due to the low compliance rate in the third quarter of 2016 (65%), PSD begin stressing the importance and requirement of these reviews by sending follow-up emails and teaching at In-Service training. The increase in compliance in 2016 Q4, and again in 2017 Q1, is a direct reflection of that effort.

In the first quarter of 2017, there were 514 “opportunities for compliance” (EIS reviews based on performance evaluations or transfers) inspected by the EIS Team. These inspections showed a compliance rate of 65.8% (338/514).

The PPB has received feedback from the DOJ that the information used to compile the numbers for Item 116© could also be used to conduct a trend analysis for PPB’s precincts and divisions. Although the EIS Team is not trained in analytical methods, PPB has provided a chart in its supporting documents that shows how the compliance rate for 116(a), (b), and © has changed over time. The chart also illustrates a sharp decline in compliance during the second and third quarters of 2016, clearly highlighting the need for continued training and communication regarding the importance of EIS use for both employee development and DOJ compliance.

2017 Q2 Update:

Item 116a:
The methodology for calculating 116a compliance changed this reporting period so that are consistently measuring data the same way. Beginning Q-2, 2017 we are calculating completed performance evaluation entries in the EIS system (116a) only if the entries were made “on time.” It was discovered during second quarter analysis that previous reporting of 116a was calculated on Performance Evaluations being completed or not, not whether the evals were completed on time. To be consistent with reporting of 116b (Transfer Reviews completed on time) this quarter’s calculations were based off of on-time compliance for 116a as well. This change in reporting showed an approximate 10% decrease in overall compliance for 116a and contributed to a decrease in overall compliance under 116c. The overall compliance rate, for all ranks reviewed for 116a, decreased from last quarter (46%) to 39.3% (117/298*) this quarter. You will note that compliance for 116a and 116c are reduced when we calculate based on the strict adherence to the Directive requiring entries be made on time. Please see the supporting documentation for a more detailed breakdown of results.

Of note, See Table 1 “2017 Q2 – 116a On Time Compliance – All Ranks, All RU’s, All Branches” PDF; and Table 2 “2017 Q2 – 116a Completed at All Compliance – All Ranks, All RU’s, All Branches” PDF

*Each rank had at least one individual who was not subject to review, noted as N/A, for one reason or another. Example: Leave of Service (LOS); Retire/Rehire.

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed on time dipped to 70.8% (148/209) down from 92.4% in Q1. Out of 209 possible transfer reviews, 148 were completed on time (42 of 61 in April, 77 of 117 in May, and 29 of 31 in June). The number of transfer reviews required in the 2nd Quarter was much higher than those of Quarter 1.

Item 116c:
In the second quarter of 2017, there were 507 “opportunities for compliance” (EIS reviews based on performance evaluations or transfers) inspected by the EIS Team. These inspections showed a compliance rate of 52.3% (265/507). The following is a breakdown of the 507 “opportunities” by RU/Division. See accompanying supporting documents for a more detailed review.

It should be mentioned again that a contributing factor to the decrease in overall compliance rates is the change in reporting for 116a (see above).

Item 117:
Includes all the data required to complete item 116 a, b, and c.
Item 116a:
The overall compliance rate for all ranks reviewed for 116a increased slightly from last quarter—39.3% to 44.6% (208/466*)—but is still considerably lower than the reported Q1 number (61%) because initially they were counted incorrectly. Please see the supporting documentation for a more detailed breakdown of results.

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed on time rose slightly to 74.2% (98/132*)—up from 70.8% in Q2. Out of 132 possible transfer reviews, 98 were completed on time (66 of 77 in July, 20 of 36 in August, and 12 of 19 in September).

Item 116c:
In the third quarter of 2017, there were 598 “opportunities for compliance” (EIS reviews based on performance evaluations or transfers) inspected by the EIS Team. These inspections showed an overall compliance rate of 51.2% (306/598). See accompanying supporting documents for a more detailed review.

It should be noted again that a contributing factor to the decrease in overall compliance rates is the change in the reporting for methodology for 116a beginning in 2017 Q2 (see above).

Item 116a:
The overall compliance rate for all ranks reviewed for this item was 42.6% (121/284), which was a slight decrease from last quarter’s 44.6%.
In examining possible explanations for this rate and the slight decrease, it appears there is still an issue in performing this task in a timely fashion as further analysis shows the reviews are completed at a higher rate (60.6%), just not in the month of the officer's anniversary. The EIS administrator intends to work with those RU managers to clarify their understanding of the timing issue.

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed on time rose to 85.1% (86/101), up from 74.2% in Q3. Out of 101 possible transfer reviews, 86 were completed on time (14 of 21 in October, 66 of 73 in November, and 6 of 7 in December).

Item 116c:
In the fourth quarter of 2017, there were 385 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the EIS Team. These inspections showed an overall compliance rate of 53.8% (207/385). The following is a breakdown of the 385 “opportunities” by RU/Division.

Item 116a:
The methodology for calculating 116a compliance changed beginning Q-2, 2017. Continuing with this method in the months of January and February, PSD calculated completed performance evaluation entries in the EIS system if the entries were made “on time.” With this strict adherence to the Directive, PSD continues to see a significantly lower compliance rate than those rates reported prior to Q2 2017.

The compliance rate for “on time” Bi-Annual Evaluation PDT Entries for the months of January and February, for the ranks of Officer, Criminalist, Detective, and Sergeant, was 40.1% (120/299).

The compliance rate for “on time” Annual Evaluation PDT Entries for the month of March, which includes all ranks, increased significantly under the updated directive and new PSD SOP. The rate jumped from 40.1% for January/February to 92.8% (64/69) for March.

For 2018 Q1 the overall “on time” compliance for 116a, combining all months, increased to 50.0% (184/368) over last quarter’s rate of 42.6%.

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” dropped from 85.1% in 2017 Q4 to 56.4%. Out of 55 possible transfer reviews, 31 were completed on time (9 of 11 in January, 20 of 33 in February, and 2 of 11 in March).
The PSD EIS Team noted far less bureau wide transfers during the first quarter of 2018 (55) compared to transfers in quarters three and four of 2017 (132 and 101). As a result, fewer emails were sent to RU Managers reminding them to ensure PDT entries were made in EIS. However, as noted above, these reminder emails appear to be a major component in obtaining substantial compliance in this area; and as such the PSD EIS Team will reinstitute reminder emails to RU Managers.

Item 116c:
In the first quarter of 2018, there were 423 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 50.8% (215/423). The breakdown of the 423 “opportunities” by RU/Division is contained in the supporting documents. Since adjusting the methodology for 116a in 2017 Q2 and establishing a reminder process from PSD to RU Managers for 116b in 2016 Q4, PSD has seen compliance rates level out and remain fairly consistent. With the recent changes to Directive 215.00, Member Performance Evaluations, and by reinstating reminder emails to RU Managers for transfer reviews, it is the PSD EIS Team’s hope to reach substantial compliance with all subsections of paragraph 116 of the Settlement Agreement by the end of 2018.

Item 117:
Proposed Settlement Agreement change: “117. PPB agrees to use force audit data to conduct similar analyses at the supervisor- and team-levels.” In past Quarterly Reports the PSD EIS Team has reported the compliance rates for 116a, b, and c for Item 117. With the aforementioned Settlement Agreement change proposal, the PSD EIS Team has drafted two new SOPs to track use of force and complaints received by RU and shift assignments. (See previously submitted “Draft Revised SOP 47” and “Draft Revised SOP 48”)
Current SOP proposals include collaborating with the PSD Data Force Collection Team to gather and analyze force data, broken down by shift, for each RU by quarter (SOP 47). A report will be generated highlighting those employees who use force, in any category, which is outside the standard deviation for other employees on the list. The Force Inspector will use this data to conduct analysis of units, shifts, and supervisors to inform discussions with specific RU managers based on trends discovered. If a trend is identified and a discussion with a RU manager is scheduled, the Force Inspector will request the EIS Administrator create a Manual EIS Alert on the RU itself to track the conversation and action taken by the RU, if any. The EIS Alert will be managed by the EIS Administrator and reported on by the PSD EIS Team in the Quarterly Report.
The PPB hopes this proposed SOP will help identify patterns of behavior by groups of people and also identify the supervisors who oversee those groups.
Please note, the Force Inspector has already begun analyzing this data and may be scheduling discussions with current RU Managers. However, pending approval of SOP 47, manual EIS Alerts on RU’s are not yet being created.
In addition to the force data analysis noted above, the PPB intends to also gather, analyze, and report on complaints and internal administrative investigations generated against sworn members. The PSD EIS Team has proposed (SOP 48) creating a report, broken down by shift, for each RU by quarter. The report will calculate the mean and standard deviation above the mean for complaints and administrative investigations, which then will be analyzed by the EIS Administrator in collaboration with the IA Lieutenant. This data will allow analysis of units, shifts, and supervisors to inform discussions with specific RU managers based on trends discovered. If a trend is identified and a discussion with a RU manager is scheduled, the EIS Administrator will create a Manual EIS Alert on the RU itself to track the conversation and action taken by the RU, if any. The EIS Alert will be managed by the EIS Administrator and reported on by the PSD EIS Team in the Quarterly Report. The PPB again hopes this proposed SOP will help identify patterns of behavior by groups of people and also those supervisors who oversee those groups.
Please note, beginning July 1st, the PSD EIS Team will create this report, analyze the data, coordinate with the IA Lieutenant, and schedule discussions with RU Managers as appropriate. However, pending approval of SOP 48, manual EIS Alerts on RU’s will not be created.

2018 Q2 Update:
In the first quarter of 2018, the Portland Police Bureau’s (PPB) directive on Member Performance Evaluations (215.00) was revised and went into effect (02/28/2018). The revised directive called for Member Performance Evaluations to be conducted on an annual basis, instead of a semi-annual basis, and applied to all sworn members (including command staff). In addition to these Directive changes, and to accurately reflect an employee’s performance on an annual basis, the Professional Standards Division
(PSD) (at the direction of the Chief’s Office) also clarified and informed all PPB supervisors that the “date of hire” for DIR. 215.00 shall be defined as an employee’s date to job class (date of appointment to rank).

In addition to the “date of hire” clarification the PSD Employee Information System (EIS) Team also worked with the Bureau’s Fiscal Division to build a database to track every PPB employee’s “job class date” to further facilitate Performance Evaluation compliance. Through this database the PSD EIS Team can generate a list of those PPB employees with a required Annual Performance Evaluation each month. Beginning in March of 2018, the first list was generated and distributed, by email, to PPB supervisors. Each month a new list is sent to RU Managers along with a follow-up/reminder email sent towards the end of the month for any employees whose Performance Evaluations have yet to be completed. The aforementioned changes were put into place to consistently evaluate employees’ performance and to gain substantial compliance with Settlement Agreement paragraphs 116(a) and ©.

Item 116a:
With the methodology change for calculating 116a (defined above), the Bureau’s compliance rate for 116a, and subsequently 116c, has increased significantly in the second quarter. The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q2 was 96.7% (117/121) versus 50.0% in Q1.

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” increased from 56.4% in Q1 to 78.9%. Out of 261 possible transfer reviews, 206 were completed on time (20 of 33 in April, 131 of 171 in May, and 55 of 56 in June).

Item 116c:
For the second quarter of 2018, there were 382 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 84.6% (323/382) up from 50.8% last quarter. Thus there is significant improvement in all paragraphs of Item 116. Although our compliance rates for Transfer Reviews are just below 80% for the second quarter, PPB is confident that the re-established reminder process will push this rate over 90%, matching 116a rates, in the third quarter.

Item 117:
The parties have agreed to a change in the Settlement Agreement to allow PPB to use force audit data to conduct similar analyses at the supervisor-and team-levels. With the aforementioned change, the EIS Team has proposed collecting different data and reporting compliance rates based on that force information. To that end, two new SOPs were submitted for review and approval by the DOJ in the second quarter of 2018, to track force users by RU and sworn members who have received complaints. Approval of these SOP’s is needed before additional reporting for this section can occur.

2018 Q3 Update: The PSD Employee Information System (EIS) Team continued to work with end users to upgrade the system in an effort to make it more usable and efficient. They also continued to work with the DOJ and COCL, implementing a number of recommendations on draft SOPs #44 and 47.

EIS worked with the PSD Force Audit Team in creating and sending out Quarterly Force Review Alerts (“Precinct Alerts”) for each of the three precincts. These reports were created in an effort to identify trends at the supervisor and team level.

An EIS Administrator Handbook was completed and submitted to the DOJ and COCL for their review. Also, a New Supervisor Packet was developed and sent out to newly promoted Sergeants who have not attended a Sergeant Academy in an effort to educate them on the proper way to utilize EIS.

In listening to the supervisors who attended the EIS class at the 2018 Supervisor In-Service, one complaint heard repeatedly was about the email notification a member receives after a supervisor has made a PDT entry into the member’s EIS record. Since EIS is not available on a member’s cell phone or the vehicle’s MDT, members were unable to immediately view the PDT entry unless they were logged into EIS on a desktop computer. In an effort to rectify this issue, PSD requested and implemented a program modification that will now allow the case notes of a PDT entry to be included within the text of the EIS email notification.
With the aforementioned change to the Settlement Agreement, PSD EIS Team has begun working with the PSD Force Audit Team, as outlined in PSD proposed SOP #47, to create RU specific alerts based on force data analyses at the shift, supervisor, and detail levels. Final implementation of SOP 47 is pending DOJ/COCL approval.

However, in the interim, Command staff from each Precinct met with the Force Inspector and were provided RU specific analysis and “action items” to address. The EIS Administrator converted these “action items” into EIS Manual Alerts (“Precinct Alerts”). These alerts were opened, processed, and closed within EIS in Q3.

**2018 Q4 Update:**
In past quarterly reports, the PSD EIS Team has reported the compliance rate for 116a, b, and c for Item 117. With the previously noted change to the Settlement Agreement, the EIS Team has begun working with the Force Audit Team, as outlined in PSD SOP 47, to create RU-specific alerts based on force data analyses at the shift, supervisor, and detail levels.

With DOJ/COCL approval of SOP 47, the PSD Force Inspector and PSD EIS Team finalized implementation of EIS Manual Alerts (“Precinct Alerts”). In Q4 the Force Inspector met with Command staff from Central, East, and North Precincts, as well as the Transit Division, to discuss RU specific analysis and “action items” to address (See supporting documentation for paragraphs 74, 75, 76, and 77 provided by the PSD Force Audit Team). The EIS Administrator converted these “action items” into EIS Manual Alerts (“Precinct Alerts”). Seven (7) alerts were opened, processed, and four of the seven were closed in Q4. (See 2018 Q4 - Precinct Alert Memos).

**Item 116a:**
The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q4 was 100.0% (137/137).

**Item 116b:**
This quarter’s compliance rate for Transfer Reviews completed “on time” dropped slightly from 100.0% in Q3 to 97.7%. Out of 87 possible transfer reviews, 85 were completed on time (28 of 28 in October, 44 of 44 in November, and 13 of 15 in December), while the remaining 2 were completed just outside of the timeline.

**Item 116c:**
For the fourth quarter of 2018, there were 224 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 99.1% (339/344).

**2019 Q1 Update:**
**Item 116a:**
With the methodology change for calculating 116a (defined previously), the Bureau’s compliance rate for 116a, and subsequently 116c, increased significantly throughout 2018 and into the first quarter of 2019. The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q1 was 99.2% (238/240).

**Item 116b:**
This quarter’s compliance rate for Transfer Reviews completed “on time” has once again hit 100%, up from 97.7% in Q4. Out of 111 possible transfer reviews, all 111 were completed on time (22 of 22 in January, 58 of 58 in February, and 31 of 31 in March).

**Item 116c:**
In quarter 1 of 2019, there were 351 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 99.4% (349/351).

**Item 117:**
Pursuant to 2018 Q4-approved SOP 47, the PSD EIS and Force Audit Teams collaborate each quarter to create RU specific alerts (known as Type III – Precinct Alerts) based on force data analyses at the shift, supervisor, and detail levels. In Q1, the Force Inspector met with Command staff from Central, East, and North Precincts to discuss RU specific analysis and “action items” related to “statistically meaningful deviations from normative behaviors [that may] place groups and their respective supervisors at risk of problematic trends” (See supporting documentation for paragraphs 74, 75, 76, and 77). To document these analyses and “action items,” the Force Inspector notified the EIS Administrator, via memorandum, and requested Precinct Alerts be created and...
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assigned to respective RU. Three (3) alerts were opened, processed by the RU, and closed in Q1.

2019 Q2 Update: Item 116a:
The Bureau’s compliance rate for 116a increased significantly throughout 2018 and remained near 100% into the second quarter of 2019. The rate for “on time” Annual Performance Evaluation PDT Entries for Q2 was 99.2% (125/126).

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” dipped slightly to 97.9%, down from 100% in Q1. Out of 287 possible transfer reviews, 281 were completed on time (180/183 in April; 80/83 in May; and 21/21 in June).

Item 116c:
In the second quarter of 2019, there were 413 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 98.3% (406/413). The practice of reminder notices to a member’s supervisor, for both performance evaluations and transfer reviews, has proven effective and the PSD EIS Team will continue this practice moving forward.

2019 Q3 Update: Item 116a:
The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q3 was 99.2% (247/249).

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” rose slightly to 99.1%, up from 97.9% in Q2. Out of 110 possible transfer reviews, 109 were completed on time (20/20 in July, 37/38 in August, and 19/49 in September).

Item 116c:
In the third quarter of 2019, there were 359 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 99.2% (356/359). (Item 117:
In Q3 the Force Inspector met with Command staff from Central, East, and North Precincts, and the Tactical Operations and Transit Divisions to discuss RU specific analysis and “action items” related to “statistically meaningful deviations from normative behaviors [that may] place groups and their respective supervisors at risk of problematic trends.” To document these analyses and “action items,” the Force Inspector sent a memo to the EIS Administrator requesting that “Precinct Alerts” be created and assigned to each respective RU.
Three (3) alerts were opened, processed by the RU, and two-of-three were closed in Q2.

2019 Q4 Update: Item 116a:
The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q4 was 100% (138/138).

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” dipped slightly to 85.9%, down from 99.1% in Q3. Out of 64 possible transfer reviews, 55 were completed on time (14/14 in October, 25/27 in November, and 16/23 in December).

Item 116c:
In the fourth quarter of 2019, there were 202 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 95.5% (193/202).

Item 117:
In Q4 the Force Inspector met with Command staff from Central, East, and North Precincts to discuss RU specific analysis and “action items” related to “statistically meaningful deviations from normative behaviors [that may] place groups and their respective supervisors at risk of problematic trends.” To document these analyses and “action items” the Force Inspector notified the EIS Administrator, via memorandum, and requested manual alerts (“Precinct Alerts”) be created and assigned to each respective RU.

Three (3) alerts were opened and processed by the RU in Q4. (See “2019 Q4 Force Analysis – 2019 Q4 Precinct Alert” Memos).

2020 Q1 Update:

Item 116a:
The Bureau’s compliance rate for “on time” Annual Performance Evaluation PDT entries for this quarter was 100% (236/236).

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” increased to 96.7%, up from last quarter’s dip of 85.9%.
Out of 269 possible transfer reviews, 260 were completed on time (33/39 in January, 175/178 in February, and 52/52 in March).

Item 116c:
In the first quarter of 2020, there were 505 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations or transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 98.2% (496/505).

Item 117:
In this quarter, in order to facilitate the Force Inspector’s meetings with Command staff from Central, East, and North Precincts, the EIS Administrator create manual alerts (“Precinct Alerts”) assigned to each respective RU.

Three (3) alerts were opened, processed by the RU, and two of the three were closed in Q1.

2020 Q2 Update:

Item 116a:
The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q2 was 99.3% (138/139). The only “late” PDT entry was originally identified as missing due to a clerical error in PSD record keeping. Once identified, PSD contacted the Personnel Division and involved supervisor, and was able to confirm the Performance Evaluation in question had been completed on time but the PDT entry had been missed. The PDT entry has since been entered, completing the requirement.

Item 116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” decreased from 96.7% last quarter to 70.0% in Q2. Out of 40 possible transfer reviews, 28 were completed on time (7/7 in April, 6/6 in May, and 15/27 in June).

Upon discovering this significant reduction, the EIS team evaluated the late entries to determine the reason so that remedial action could be taken, if necessary.

The Portland Police Bureau saw a change in leadership on June 11, 2020, with the appointment of a new Chief of Police. This appointment resulted in several command level promotions and transfers. Although PSD sent reminder emails before the transfer review due date, the Chief wasn’t able to document his completed EIS reviews in a PDT entry until after the deadline.

During this same time period, a new Lieutenant was transferred to the Family Services Division (FSD). A reminder email was sent to the PSD lieutenants on July 1st, but due to the transition in PSD, a reminder phone call was not made to FSD until after the transfer review due date.

Thus, PSD sent a reminder email on June 25, 2020 to all managers regarding Directive 345.00 transfer review requirements.

Further, PSD continues the practice of reminding supervisors of pending/overdue EIS Transfer Reviews & PDT entries. Additionally, the Bureau created and attached a transfer list to the Uniform Daily Assignment Roster (UDAR) that is accessible to all bureau members. This transfer list provides an additional, daily reminder to supervisors of personnel transfers within their RU/Division.

Item 116c:
In the second quarter of 2020, there were 179 “opportunities for compliance” (EIS reviews & PDT entries based on performance evaluations and transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 92.7% (166/179).

Item 117:
PSD EIS and OIG Force Audit Teams collaborate each quarter to create RU specific Precinct alerts (known as Type III) based on force data analyses at the shift, supervisor, and detail levels. In this quarter, the Force Inspector met with Command staff from Central, East, and North Precincts, and the Tactical Operations Division, to discuss RU specific analysis and “action items” related to “statistically meaningful deviations from normative behaviors [that may] place groups and their respective supervisors at risk of problematic trends.” To document these analyses and “action items” the Force Inspector notified the EIS Administrator, via memorandum, and requested manual alerts (“Precinct Alerts”) be created and assigned to each respective RU. Four (4) alerts were opened, processed by the RU, and three-of-four were closed in Q2.

2020 Q3 Update:

116a:
The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q3 was 98.1% (208/212).
The Chief’s Office had two overdue PDT entries in this quarter. The EIS Team reviewed these instances and determined they were not due to systemic failure. In one instance, there was an oversight and the RU Manager did not receive initial notice that a performance review was due on a sworn member, resulting in the delay. In the second instance, the RU Manager and member were on non-overlapping blocks of vacation during the month, resulting in the delay.

116b:
This quarter’s compliance rate for Transfer Reviews completed “on time” has increased to 96.8%, up significantly from last quarter (70.0%) and returning to a level of substantial compliance in this category. Out of 346 possible transfer reviews, 335 were completed on time (203/212 in July, 106/107 in August, and 26/27 in September).

While this measure saw a significant drop in Q2 compliance rates (70%), PSD is confident the EIS Team’s continued practice of reminder notices to a member’s supervisor, for both performance evaluations and transfer reviews, is the most effective method to ensure substantial compliance as demonstrated by the 96.8% compliance rate for 116b in Q3.

To that end, on June 25, 2020 and again on August 19, 2020, PSD sent reminder emails to all managers regarding EIS transfer review requirements under Directive 345.00. Further, PSD continues the practice of reminding individual supervisors of pending/overdue EIS Transfer Reviews & PDT entries. Additionally, the Bureau recently created and attached a transfer list to the Uniform Daily Assignment Roster (UDAR) that is accessible to all bureau members. This transfer list continues to provide an additional, daily reminder to supervisors of personnel transfers within their RU/Division.

116c:
In the third quarter of 2020, there were 558 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations and transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 97.3% (543/558).

117:
During this quarter, the Force Inspector met with Command staff from Central, East, and North Precincts, to discuss RU specific analysis and “action items” related to “statistically meaningful deviations from normative behaviors [that may] place groups and their respective supervisors at risk of problematic trends.” To document these analyses and “action items,” the Force Inspector notified the EIS Administrator, via memorandum, and requested manual alerts (“Precinct Alerts”) be created and assigned to each respective RU. Three (3) alerts were opened in Q3.

2020 Q4 Update:

Item 116a:
The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q4 was 99.2% (129/130).
116b: PSD continues the practice of reminding individual supervisors of pending/overdue EIS Transfer Reviews & PDT entries in compliance with Settlement Agreement. This quarter’s compliance rate for Transfer Reviews completed “on time” dipped to 93.5%, down slightly from last quarter (96.8%) but still remaining a high level of compliance for this category. Out of 92 possible transfer reviews, 86 were completed on time (30/31 in October, 52/54 in November, and 4/7 in December).

116c: In the fourth quarter of 2020, there were 222 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations and transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 96.8% (215/222).

Item 117: In the fourth quarter, the Force Inspector met with Command staff from Central, East, and North Precincts, to discuss RU specific analysis and “action items” related to “statistically meaningful deviations from normative behaviors [that may] place groups and their respective supervisors at risk of problematic trends.” To document these analyses and “action items” the Force Inspector notified the EIS Administrator, via memorandum, and requested manual alerts (“Precinct Alerts”) be created and assigned to each respective RU. Three (3) alerts were opened in Q4. Also included for Q4 reporting are the EIS “Case Notes” from each Precinct Alert. These “notes” include the Precinct’s response to the Force Inspector’s Q3 analysis and “action items.”

2021 Q1 Update: 116a: PPB Member Performance Evaluations continue to be conducted on an annual basis and include all sworn members. Each month, the PSD EIS Team generates and distributes, by email, a list of required evaluations to PPB supervisors. This practice, along with follow-up/reminder emails for any outstanding evaluations, has helped maintain the Bureau’s compliance rate for 116a, and subsequently 116c, near 100% throughout 2019, 2020, and now into 2021. The compliance rate for “on time” Annual Performance Evaluation PDT Entries for Q1 was 97.7% (212/217).

116b: This quarter’s compliance rate for Transfer Reviews completed “on time” was at 95.3%, up slightly from last quarter (93.5%), continuing to be a high level of compliance for this category. Out of 211 possible transfer reviews, 201 were completed on time (39/46 in January, 151/154 in February, and 11/11 in March).

116c: In the first quarter of 2021, there were 428 “opportunities for compliance” (EIS reviews/PDT entries based on performance evaluations and transfers) inspected by the PSD EIS Team. These inspections showed an overall compliance rate of 96.3% (412/428).

The PSD EIS Team’s continued practice of reminder notices to a member’s supervisor, for both performance evaluations and transfer reviews, has proven to be the most effective method to ensure substantial compliance in all three categories of Par. 116 of the Settlement Agreement.
Continue existing and add new EIS thresholds to trigger case management review

**Task Requirements:** PPB shall continue to use existing thresholds, and add on additional threshold, to trigger case management reviews:

- any officer who has three uses of force in a one-month period.

**Status** Actively in Process

**Action Steps:**
1. PPB will request for the EIS contractor to implement additional trigger as required in this agreement
2. PPB will amend internal policies to reflect new threshold in EIS once the technological change is made

**Task Date Completed:**

**Evidence of Completion:**
1. EIS contractor proposal

**Status Note:**

**2014 Q1 Update:** Modification to PPDS not made due to pending RegJIN replacement project. Issue identified as one that needs to be included in Statement Of Work for contractor who will incorporate EIS in the RegJIN system.

**2014 Q2 Update:** Statement of Work (SOW) completed with this requirement. PPB in process of negotiating the contract with the sole system's developer.

**2014 Q3 Update:** Contract negotiations continued related to all of the requirements for the EIS system, including the additional threshold for three uses of force in a one month period. The due date for that item of work is consistent with the requirement of the Agreement so expect deliverable by November 29, 2014.

**2014 Q4 Update:** The additional threshold to trigger review of any officer who has three uses of force in a one month period has been designed, implemented, tested and operationalized. There were two alerts related to this threshold in this quarter.

**2015 Q1 Update:** There were 289 alerts created in the 1st quarter of 2015. Of the 289 alerts, 129, or about 45%, were for thresholds related to force. Only 5 alerts were for officers who used force 3 times in 30 days. Of those, two were anomalies; one was a reporting error, one involved three relatively low levels of force; and one had extensive use of deescalation prior to force use. All were within policy with no deficiencies debriefed. In addition, in none of the five cases did the 3 in 30 day alert occur concurrently with another force alert.

The remaining 124 alerts were for officers who broke thresholds related to force ratios (i.e. use of force in 20% of arrests in past six months or used force three times more than the average number of those on same shift). 122 were closed after review by administrator's supervisor mainly because use was within policy and there were no patterns of activity to address. Two were sent out to RU managers for review--one is awaiting a supervisor's review and the other is in intervention monitoring.

**2015 Q2 Update:** There were 91 alerts created in the 2nd quarter. Of those 91 alerts, 50, or about 55%, were for thresholds related to force. No alerts were for officers who used force 3 times in 30 days. These numbers are not broken out for individual thresholds because officers often break both force ratio thresholds, which are then combined into one alert. Breaking out each threshold individually would overstate by a nontrivial number the quantity of alerts processed in the quarter.

The numbers above are only for alerts that were “created” in the 2nd quarter according to the definition used in the EIS Annual Report. That is, there were 91 alerts that were given a number in the 2nd quarter, regardless of when the threshold was broken. This is important because the threshold system was off line for about 11 weeks to accommodate a system upgrade related to the new RegJIN report writing and records management system. The system was restarted on June 23, 2015, resulting in a significant backlog of alerts. As of July 19, 2015, 121 alerts are still awaiting a review from the EIS Administrator. An additional 99 alerts were reviewed and a decision made by the EIS Administrator between July 1, 2015, and July 19, 2015. These 220 alerts that either are still awaiting a review or were reviewed in July include alerts for thresholds that were broken after the threshold system was restarted.

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Friday, May 7, 2021
There are only a small number of force alerts that were sent out for RU review. The main reason for this is the 940 process. EIS was implemented prior to the requirement that all force events be documented and reviewed in an after action. The supervisors on scene are identifying and correcting many of the issues EIS was originally designed to identify and correct. The alerts that are sent out for force are largely related to issues outside of an individual use of force, such as a potential pattern that could be concerning.

As of July 19, 2015, there were 27 open alerts. Only 4 of these alerts were related to force. The higher than usual number of alerts can be attributed to the rapid clearing of the backlog of alerts. Since alerts are leaving PSD at a higher than normal rate, the natural consequence is more open alerts. Of note, 15 of the open alerts (56%) are for commendations, meaning that officers are regularly getting compliments from both their chain of command and citizens.

The EIS Administrator wrote an SOP that covers alert processing. This SOP lays out guidelines for processing every type of alert and should serve as a useful reference in the future.

In addition this quarter, EIS underwent an upgrade required so that the system would work with the Bureau’s new report writing and records management system. As part of this upgrade, a new threshold was added for employees who experience 3 traumatic incidents in 30 days. PPB expects to adjust the sensitivity of this threshold as more data is collected. The overarching goal is to identify officers who have experienced a lot of trauma in a relatively short period of time and who may benefit from an intervention.

2015 Q3 Update:

As noted last quarter, an alert is considered to be “created” when it is given a case number. This is especially important to understand this quarter because, as mentioned before, the threshold system was turned off for about 11 weeks to accommodate a system upgrade related to the new RegJIN report writing and records management system. The threshold system was restarted on June 23, 2015, resulting in a significant backlog of alerts. These alerts were assigned case numbers roughly in line with when the EIS Administrator was able to review and process them. Not all of the alerts that EIS found when the threshold system was turned back on were created in the same quarter. In fact, two hundred twenty alerts related to this backlog were created in July 2015 even though EIS identified the threshold break when the threshold system was restarted on June 23, 2015.

Thus, there were 384 alerts “created” in the third quarter even though a number of those occurred in the second quarter. Of those 384 alerts, 188, or about 50%, were for thresholds related to force. Nine of the 188 force alerts were for officers who used force 3 times in 30 days. These numbers are not broken out further, that is, for individual force ratio thresholds because officers often break both force ratio thresholds (relative to detail and the 20% threshold). Those threshold breaks are then combined into one alert because it is simpler and more efficient to analyze them together; the analysis of each threshold individually would be redundant.

Of the 384 alerts created in the 3rd quarter, 47, or about 12%, were sent out for review by an RU Manager. The alerts sent out for review included 10 force alerts (3 for using force 3 times in 30 days), 9 complaint alerts, 26 commendation alerts, and 2 traumatic incident alerts. The force alerts sent out for review represent approximately 5% of force alerts created, although in this quarter 33% of the alerts related to force in 30 days were sent out for review.

Recent feedback supplied by both COCL and DOJ has mentioned the low rate of alerts being sent for RU review. Responsive to that feedback, the EIS Administrator analyzed the force alerts created in September 2015 to illustrate the reason for the low number sent out for RU review. In that month, 42 total alerts were created, and 4 were sent for review. The 38 alerts that were not sent for an RU review were assigned to one of 5 categories: duplicate, transfer, singular use of force, data error, and other. Alerts were considered to be declined as a duplicate if a prior alert had reviewed all of the uses of force under review in the present alert. Alerts were considered to be declined for transfer if a transfer was primarily responsible for the alert (for example, one officer had a force ratio that was in line with his peers at his old assignment but markedly higher than the officers assigned to his new detail, which caused an alert; another officer got an alert when a transfer to an off street assignment due to injury caused his force ratio to spike). Alerts were considered to be declined as a singular use of force if the alert was created based on only one use of force. This category was composed of a considerable number of alerts on supervisors. Alerts were considered to be declined as a data error if a data error caused the alert to be created (note that these alerts were still reviewed for concerns prior to being declined). Alerts were considered to be declined for other reasons if none of the above criteria applied. Some alerts were declined for more than one reason (for example, it was a duplicate alert based on a singular use of force). When this was the case, the alert was arbitrarily
assigned to only one category to avoid over reporting decline data. In September 2015, 13 alerts were declined as duplicates, 12 alerts were declined as singular uses of force, 3 alerts each were declined as transfers and data errors, and 7 alerts were declined as other.

As mentioned in other communications, the EIS Administrator and PSD Staff look forward to being able to confer with DOJ and COCL to provide them with a working understanding of EIS and its various systems.

**2015 Q4 Update:** There were 281 alerts created in the 4th quarter of 2015. Of those 281 alerts, 170, or about 60%, were for thresholds related to force. Eleven of the 188 force alerts were for officers who used force 3 times in 30 days. These numbers are not broken out further, that is, for individual force ratio thresholds because officers often break both force ratio thresholds (relative to detail and the 20% threshold). Those threshold breaks are then combined into one alert because it is simpler and more efficient to analyze them together; the analysis of each threshold individually would be redundant. Breaking out each threshold individually would overstate by a nontrivial number the quantity of alerts processed in the quarter.

Of the 281 alerts created in the quarter, 17, or about 6%, were sent out for review by an RU Manager. The alerts sent out for review included 9 force alerts (2 for using force 3 times in 30 days), 1 complaint alert, and 7 commendation alerts. The decrease in alerts from the 3rd to 4th quarter is largely due to a decrease in commendation alerts that were sent out for review (from 26 to 7). The force alerts sent out for review represent approximately 5% of force alerts created, although in this quarter 18% of the alerts related to force in 30 days were sent out for review. As of January 31, 2016, there were 20 open alerts that were created in 2015. Seven of these alerts were related to force.

**2016 Q1 Update:** There were 425 alerts created in the 1st quarter of 2016. Of those 425 alerts, 161, or about 38%, were for thresholds related to force. Four of the 161 force alerts were for officers who used force 3 times in 30 days. These numbers are not broken out further, that is, for individual force ratio thresholds because officers often break both force ratio thresholds (relative to detail and the 20% threshold). Those threshold breaks are then combined into one alert because it is simpler and more efficient to analyze them together; the analysis of each threshold individually would be redundant. Breaking out each threshold individually would overstate by a nontrivial number the quantity of alerts processed in the quarter. Of the remaining alerts, 230 were for commendations, 25 were for complaints, and 9 were for traumatic incidents.

Of the 425 alerts created in the quarter, 37, or about 9%, were sent out for review by an RU Manager. The alerts sent out for review included 12 force alerts (1 for using force 3 times in 30 days), 5 complaint alert, and 20 commendation alerts. More alerts of each type were sent out in this quarter as compared to the prior quarter, and the percentage of alerts sent out for review also increased by 50% (from 6% to 9%). The force alerts sent out for review represent approximately 7% of force alerts created, although in this quarter 25% of the alerts related to force in 30 days were sent out for review.

In February 2016, EIS staff met with COCL and DOJ to provide a more in depth briefing on EIS. Over half of the day was devoted to the alert system and alert processing. PPB looks forward to receiving feedback on this meeting.

**2016 Q2 Update:** There were 212 alerts created in the 2nd quarter of 2016. Of those 212 alerts, 147, or about 69%, were for thresholds related to force. Eleven of the 147 force alerts were for officers who used force 3 times in 30 days. These numbers are not broken out further (for individual force ratio thresholds) for reasons described in past reporting. Of the remaining alerts, 34 were for commendations, 31 were for complaints, and 0 were for traumatic incidents.

Twenty of the 212 alerts created in the quarter, or about 9%, were sent out for review by an RU Manager. The alerts sent out for review included 9 force alerts (2 for using force 3 times in 30 days), 5 complaint alerts, and 6 commendation alerts. The percentage of alerts sent out for review remained constant quarter over quarter, although last quarter represented a 50% increase from the prior quarter. In other words, the number of alerts sent out for review increased substantially in the 1st quarter of 2016, and that high number was maintained in the 2nd quarter. The force alerts sent out for review represent approximately 7% of force alerts created, although in this quarter 18% of the alerts related to force in 30 days were sent out for review.

In mid June 2016, PPB released what is believed to be a first of its kind examination of the effectiveness of what the academic
community calls an “Early Intervention System” at identifying employees who are at risk of a career ending or career limiting event. Past research has examined the effectiveness of various interventions as well as the organization-level effects of “E-I Systems,” but no prior research, to our knowledge, has tried to determine how effectively a threshold system can select at-risk officers. Although this paper was supplied in its entirety to DOJ, a summary will be provided here for convenience.

It is generally understood that the primary reason for existence of an E-I system is the identification of employees who are at risk of experiencing a career limiting or career ending event. Once identified, the law enforcement organization, through its supervisors, can then intervene with the employee and potentially prevent the event from occurring. PPB defined these events in two ways: an event that caused the City to pay more than $5,000, and an event that resulted in the employee receiving at least one day off without pay.

The base rate of these events in the sworn population of PPB is about 2.5%. That is, in any given year, about 25 employees per thousand will experience some event that is in one of the two categories above. Two analyses were performed to determine how well EIS selected employees relative to this base rate. Both analyses were done using the employee as the unit of analysis; employees who experienced multiple adverse events or EIS alerts in the period under study had those events merged.

The first analysis looked strictly at employees who actually experienced adverse events. In this case, EIS was able to identify such employees at approximately twice the base rate. In other words, 5% of the employees for which EIS created an alert went on to experience an adverse event. This result means that out of every 20 employees for which EIS created an alert, 19 did not go on to experience an adverse event.

The second analysis looked at employees who actually experienced adverse events as well as employees who had an EIS alert sent out to their RU Manager. In this case, EIS was able to identify employees at about four times the base rate. In other words, 10% of the employees for which EIS created an alert either had that alert sent out for RU Manager review or went on to experience an adverse event (or both). This result means that for every 10 employees for which EIS created an alert, 9 did not go on to experience an adverse event, nor was the alert sent out for their RU Manager to review.

This research constituted an initial look at the effectiveness of EIS in identifying employees who are at risk of experiencing a career limiting or career ending event. Future research is planned, potentially including a study of the potential effects of varying the thresholds as well as a comparison of similarly situated employees who did, and did not, have these events occur in their careers.

2016 Q3 Update: The terminology used in this section is consistent with that used in past quarters. Please see past reporting for more information.

There were 188 alerts created in the 3rd quarter of 2016. Of those 188 alerts, 140, or about 74%, were for thresholds related to force. Seven of the 140 force alerts were for officers who used force 3 times in 30 days. These numbers are not broken out further (for individual force ratio thresholds) for reasons described in past reporting. Of the remaining alerts, 9 were for commendations, 33 were for complaints, and 6 were for traumatic incidents.

Twenty-one of the 188 alerts created in the quarter, or about 11%, were sent out for review by an RU Manager. The alerts sent out for review included 8 force alerts (3 for using force 3 times in 30 days), 7 complaint alerts, and 6 commendation alerts. The percentage of alerts sent out for review increased approximately 20% (11% is about 20% greater than 9%) quarter over quarter. This increase came after an approximately 50% increase in alerts sent out two quarters ago. In other words, the number of alerts sent out for review increased substantially in the 1st quarter of 2016, and this quarter saw another moderate increase in that number. The force alerts sent out for review represent approximately 6% of force alerts created, although in this quarter 43% of the alerts related to 3 uses of force in 30 days were sent out for review.

In mid June 2016, PPB released what is believed to be a first of its kind examination of the effectiveness of what the academic community calls an “Early Intervention System” at identifying employees who are at risk of a career ending or career limiting event. This research constituted an initial look at the effectiveness of EIS in identifying employees who are at risk of experiencing a career limiting or career ending event. PPB had several productive conversations with COCL and DOJ over the course of the 3rd
quarter regarding this report, its implications, and the potential for further inquiry. Future research on a variety of topics related to EIS will be undertaken over the course of the next year.

Included in the supporting documentation is a chart with information on alerts created by quarter. This chart has information on total alerts, alerts for employees who broke a force threshold, alerts for employees who used force three times within thirty days, and alerts sent out for additional review each quarter.

**2016 Q4 Update:** The terminology used in this section is consistent with that used in past quarters. Please see past reporting for more information.

There were 222 alerts created in the 4th quarter of 2016. Of those 222 alerts, 192, or about 86%, were for thresholds related to force. Eleven of the 192 force alerts were for officers who used force 3 times in 30 days. These numbers are not broken out further (for individual force ratio thresholds) for reasons described in past reporting. Of the remaining alerts, 1 was for commendations, 29 were for complaints, and 0 were for traumatic incidents.

Eighteen of the 222 alerts created in the quarter, or about 8%, were sent out for review by an RU Manager. The alerts sent out for review included 11 force alerts (1 for using force 3 times in 30 days), 6 complaint alerts, and 1 commendation alert. The force alerts sent out for review represent approximately 6% of force alerts created.

**2017 Q1 Update:** There are currently six unique thresholds that create alerts requiring some action.

There were 232 alerts created in the 1st quarter of 2017. Of those 232 alerts, 180, or about 78%, were for thresholds related to force. Seven of the 180 force alerts were for officers who used force 3 times in 30 days. These numbers are not broken out further (for individual force ratio thresholds) for reasons described in past reporting.

Of the remaining 52 alerts, 17 were for commendations, 34 were for complaints, and 1 was for traumatic incidents.

Although all alerts were initially reviewed by the EIS Administrator, thirty-seven (37) of the 232 alerts created in the quarter, or about 16%, were sent out for further review by an RU Manager. This represents a 100% increase in the percentage of alerts sent out to the RU over the previous quarter but PPB is aware that the goal is for that percentage to increase to a much higher degree. The alerts sent out for review included 20 force alerts (2 for using force 3 times in 30 days), 4 complaint alerts, and 13 commendation alerts. The force alerts sent out for review represent approximately 9% of force alerts created, and represents a 50% increase from the previous quarter.

Included in the supporting documentation is a chart with information on alerts created by quarter. This chart has information on total alerts, alerts for employees who broke a force threshold, alerts for employees who used force three times within thirty days, and alerts sent out for additional review each quarter. (See 2017 Q1 Item 118 Supporting Document - Graph 1 & Graph 2)

**2017 Q2 Update:** The thresholds established by the Settlement Agreement remain in place as noted in previous reports.

Historically, all alerts have been reviewed. However, the methodology to determine the responsibility for that review was changed significantly in recent months. Those changes were reflected in the increased RU level reviews reported in 2017 Q1. The data for this quarter represents a further evolution of that change, as eighty-eight of the 277 alerts created in the 2nd quarter were sent to the RU for review. This represents a 138% increase in RU-level reviews from the previous quarter. Thus 32% of all alerts this quarter were sent to the RU which, again, is a big improvement from 16% last quarter and a marked one from 8% in 2016 Q4.

Included in the supporting documentation is a chart with information on the alerts created this quarter. This chart shows the total number of alerts, numbers of force alerts by type of threshold break, and alerts sent for RU review.

The EIS team also developed a monitoring plan for the future. Beginning July 1, 2017, the EIS Team will collect Intervention data so that the individual effectiveness of specific interventions can be analyzed and compared across multiple Rus.

**2017 Q3 Update:** The thresholds established by the Settlement Agreement remain in place as noted in previous reports.

A new methodology was established in the first two quarters of 2017 that increased the number of alerts being reviewed by
members’ RU Managers. (See 2017 Q-2 Addendum report). These methodological changes resulted in an increase in RU level reviews of alerts in Q1 (16%) and Q2 (32%). That trend continued in Q3 as a substantial increase occurred with 155 of 250 of all alerts generated in Q3 being reviewed by a members’ RU Manager and/or direct supervisor which equates to 62%.

Included in the supporting documentation for this report is a chart with information on alerts created this quarter. This chart contains information on total alerts, the number of force alerts, specifically Force Count, and a total of all alerts sent to the RU for review.

In addition to alert information provided in previous reports, this quarter also includes information and numbers on alert closures and “interventions.” This information has only recently been tracked in a way that EIS staff could count and evaluate it. In the distant future, this may provide some data to explore how successful “interventions” may be, both for the organization and the individual member, although causality will always be an issue.

For this report, only those alerts closed during the third quarter--between July 1st and September 30th--are included. They are broken down further by “Closed by PSD” and “Closed by RU”. There were 244 alerts closed and of those, 126 were reviewed and closed by the member’s RU Manager which is 51.6%.

2017 Q4 Update:

The thresholds established by the Settlement Agreement remain in place.

Since implementation of the new methodology, the number of alerts reviewed at the RU level has increased from 8.1% (18 of 222) in Q4 of 2016 to 62.7% (198 of 316) for this quarter. This obviously represents a marked increase in alerts reviewed by the RU Manager and/or member’s direct supervisor. (See 2017 Q4 - Item 118 Supporting Document – Graph 1)

Included in the supporting documentation for this report is a graph with information on total alerts, the number of force alerts, specifically the Force Count threshold break alerts, and a total of all alerts sent to the RU for review. (See 2017 Q4 - Item 118 Supporting Document – Graph 2)

On August 23, 2017 the new Force Directive, 1010.00, took effect. The revisions to the policy included the creation of Force Categories, I - IV. After the implementation of these force categories, the EIS Team began noting an increase in threshold breaks generated as a result of Category IV types of force. To document this increase in alerts, the EIS Team began distinguishing force alerts generated by Category IV types of force versus all other types of force. As a result, Q4 of 2017 ended with 214 force alerts, of which 100 (or 45%) were referred to RU Managers for review. This is an 85% increase over Q3 totals (100/54) and a 244% increase over Q2 (100/29). Of the 100 force alerts sent out, 80 were generated by a Category IV type of force which is a significant increase compared to the 29 total force alerts sent out in Q2. Due to this increase in force alert referrals, the EIS Team is working with the DOJ and the COCL on a proposed plan to value each Category IV type of force as .5 or ½ of a force event. The hope is this calculation will lower the overall number of force alerts sent out for review and increase the relevance of each force alert referral. (See 2017 Q4 - Item 118 Supporting Document – Graph 1 and 2017 Q4 - Item 118 Supporting Document – Graph 3)

In addition to alert information, this quarter expands on third quarter reporting of alert closures and “interventions”. This information has only recently been tracked in a way that EIS staff could count and evaluate. Future quarters will provide a better understanding over time of how successful “interventions” may be; both for the organization and the individual member. For this report, only those alerts closed during the fourth quarter are included in the count, regardless of when they were originally created. For Q4 there were 262 alerts closed and of those, 147 were reviewed by the member’s RU Manager (147/262 or 56.1%) before closure. This shows an increase over Q3 RU reviews (126/244 or 51.6%).

There was also an 87.5% reduction in the number of alerts declined at the RU Manager level from Q3 to Q4. (243 or -87.5%) and an increase of 126% for the alerts sent to the immediate supervisor for review (23/52 or 126%). (See 2017 Q4 - Item 118 Supporting Document – Graph 4 and 2017 Q4 - Item 118 Supporting Document
Of the 316 alerts created in Q4, 214 were force related and of those, 19 (or 8.8%) were related to a threshold break of three or more uses of force in the preceding 30 days. (See 2017 Q3 Item 118 Supporting Document – Graph 2).

2018 Q1 Update:  The thresholds established by the Settlement Agreement remain in place as reported in previous reports.

For Q1 of 2018, there were a total of 335 force alerts; 125, or 37.3%, of which were generated by Category IV force. Additional breakdowns include 159, or 47.5%, of the 335 force alerts generated being referred to RU Managers for review. This referral rate is a 59% increase over that of 2017 Q4 totals (159/100). Additionally, of the 159 force alerts sent to RU Managers, 123 of those were generated by Category IV force; again showing a significant increase compared to the twenty (20) total force alerts sent to the RU in Q1 of 2017.

Due to the consistent increase in the number of threshold breaks and the amount of force alerts being sent to the RU for review as a result of Category IV force, the PSD EIS Team has proposed a change to SOP 44, and is working with the DOJ and the COCL on a plan to value each Category IV type of force as .5 or ½ of a force event. If this change were in effect for Q1 of 2018, alerts would have decreased from 335 to 153; which is similar to the average number of alerts prior to Category IV types of force being counted. The number of alerts that would have been sent out would have decreased from 159 to 76. Of note, the PSD EIS Team has received feedback from numerous supervisors at all levels that the amount of alerts being sent out for review has been overwhelming. (See 2018 Q1 - Item 118 Supporting Document – Graph 1a and 2018 Q1 - Item 118 Supporting Document – Graph 3)

In addition to alert information provided in previous quarterly reports, this quarter expands on 2017 Q3 reporting of alert closures and “interventions”. This information has only recently been tracked in a way that the PSD EIS Team could count. For this report, only those alerts closed during the first quarter are included in the count. This means alerts, regardless of when they were originally created, with a closure date between January 1st and March 31st were counted. For this report there were 542 alerts closed during Q1 and of those 351 were reviewed by the member’s RU Manager (351/542 or 64.8%) before closure. (See 2018 Q1 - Item 118 Supporting Document – Graph 4)

The PSD EIS Team has analyzed the data collected on intervention types for the past 3 quarters, and has determined additional training for supervisors on intervention types is needed before further analysis can be performed. For this objective, definitions for each intervention type have been developed and training will be provided at the 2018 Supervisor In-service. The training will discuss each type of intervention and when to use them, with an effort to more accurately document and track what action was taken, if any, to address the alert. (See attached EIS Intervention Definitions and 2018 Q1 - Item 118 Supporting Document – Graph 5)

Of the 467 alerts created in Q1, 335 were force related and of those, 28 (or 8.4%) were related to a threshold break of three or more uses of force in the preceding 30 days.

2018 Q2 Update:  The thresholds established by the Settlement Agreement to create alerts remain in place as reported in previous reports.

Since initial implementation, the number of alerts reviewed at the RU level has increased from 15.9% (37 of 232) in Q1 of 2017 to 65.2% (272 of 417) for this quarter. This represents a 635% increase in alerts reviewed by the member’s RU Manager and/or direct supervisor.

Also included in the supporting documentation for this report is a graph containing information on total alerts, the number of force alerts, specifically the Force Count Threshold break alerts, and a total of all alerts sent to the RU for review.

In August 2017, a new Force Directive (DIR. 1010.00) went into effect. One of the directive’s revisions included the creation of Force Categories. After implementation of these force categories, the EIS Team began seeing an increase in threshold breaks generated as a direct result of Category IV types of force. To document this increase in alerts, the EIS Team began tracking force alerts generated by Category IV force versus all other types of force. In Q2 of 2018, there were a total of 252 force alerts generated; 94 or 37.3%, of which were triggered by a Category IV type of force. To address this increase in overall force alerts, the EIS Team has proposed a change to SOP 44 and is awaiting additional conversations and approval from the DOJ.

In addition to the alert information provided in previous quarterly reports, this quarter expands on reporting of alert closures and “interventions”. This information has only recently been tracked in a way that the EIS Team could quantify. For this report, only
those alerts closed during the second quarter are included in the count. This means alerts, regardless of when they were originally created, with a closure date between April 1st and June 30th were counted. Thus there were 415 alerts closed during Q2 and of those 268 were reviewed by the member’s RU Manager (268/415 or 64.6%) before closure.

The EIS Team has tracked and attempted to analyze data collected on intervention types for the past four quarters. As a result of this analysis, the EIS Team discovered program errors and inconsistencies by supervisors in properly recording interventions used within the EIS system. In an effort to remedy these issues, changes were made to the EIS program, alert intervention types were narrowed from nine to six, definitions were established, and training/instruction was provided at the 2018 Supervisors In-service. It is the Team’s hope that these changes, along with continued training to supervisors, will provide a more accurate representation of interventions conducted and that better analysis can be gleaned from alert processing and closures at the RU level.

Item 119:
Of the 417 alerts created in Q2, 252 were force related and, of those, 25 (or 9.9%) included at least one threshold break for three of more uses of force in the preceding 30 days.

2018 Q3 Update: The thresholds established by the Settlement Agreement remain in place.
The number of alerts reviewed at the RU level this quarter was 179 of 283 or 63.3%.

In the third quarter, there were a total of 163 force alerts generated; 48 or 29.4% of which were triggered by a Category IV type of force.

For this report there were 320 alerts closed during Q3 and of those, 218, or 68.1%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted” and “30-Day Monitoring”, made up 42% (91/218) of the 218 alerts processed and closed at the RU level.

Of the 283 alerts created in Q3, 163 were force-related and of those, 12 (or 4.2%) included at least one threshold break for three or more uses of force in the preceding 30 days.

2018 Q4 Update: The thresholds established by the Settlement Agreement remain in place.
Since initial implementation, the number of alerts reviewed at the RU level has increased from 15.9% (37 of 232) in Q1 of 2017 to 54.8% (188 of 343) for this quarter.

Included in the supporting documentation for this report are graphs containing information on total alerts (343), the number of force alerts (197), Force Count Threshold break alerts (7), and a total of all alerts sent to the RU for review (188). In addition, general force (43) and CAT IV triggered force alerts (22) that were sent to the RU for review are also included.

Beginning October 1, 2018, the EIS Team began recalculating CAT IV type force as ½ an event when factoring force percentages for Shift Force Ratio, Force Ratio, and Force Count Alerts, unless the type of force was reviewed as a higher category. Of those force alerts generated in EIS, 86 alerts could have been sent to the RU Manager for review. Using the new CAT IV calculation resulted in the declination of 43 of the 86 (50%) force alerts. The remaining 43 force alerts were sent to the RU Managers for review. An additional 5 of the 43 force alerts could have been declined if the EIS Administrator strictly adhered to the aforementioned amended ½ an event calculation. In these 5 alerts, the EIS Administrator followed the new SOP 44 to count CAT IV force events as a whole event because the force type was reviewed as a higher category.

In addition to alert types and totals, this report also includes alert closures. In Q4 there were 319 alerts with a closure date between October 1st and December 31st and of those 157, or 49.2%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted” and “Debriefing w/Employee”, made up 66 of the 157 (42%) of the alerts processed and closed at the RU level.

Of the 343 alerts created in Q4, 197 were force-related and, of those, 7 (or 3.5%) included at least one threshold break for three or more uses of force in the preceding 30 days.

2019 Q1 Update: The thresholds established by the Settlement Agreement remain in place.
The number of alerts reviewed at the RU level was 178 out of 336 (53%).

Included in the supporting documentation for this report are graphs containing information on total alerts (336); the total number of force alerts (174); Force Count threshold break alerts (14); and a total of all alerts sent to the RU for review (178) as well as general force (6) and CAT IV triggered force alerts (31) that were sent to the RU for review.

With regard to alert closures, there were 319 alerts with a closure date between January 1 and March 31. Of those, 161 were reviewed by the member's RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted”, “Debriefing w/Employee”, and “EAP Referral” made up 71 of the 161, or 44%.

Of the 336 alerts created in Q1, 174 were force related and of those, 14 (or 8%) included at least one threshold break for three or more uses of force in the preceding 30 days. Of the 174 force alerts, 37 alerts were sent to RU managers for review.

2019 Q2 Update:  The thresholds established by the Settlement Agreement remain in place.

The number of alerts reviewed at the RU level was 302 of 435 for this quarter. This represents a 716% increase in the number of alerts reviewed by the member's RU Manager and/or direct supervisor since 2017.

Also included in the supporting documentation for this report are graphs containing information on total alerts (435), the total number of force alerts (163), Force Count threshold break alerts (32), and a total of all alerts sent to the RU for review (302) as well as general force (23) and CAT IV triggered force alerts (40) that were sent to the RU for review.

In addition to alert types and totals this report also includes alerts closures. In Q2 there were 362 alerts with a closure date between April 1st and June 30th and of those, 232, or 64.1%, were reviewed by the member's RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted”, “Debriefing w/Employee”, and “EAP Referral” made up 79 of the 232 alerts (or 34%) processed and closed at the RU level.

Of the 435 alerts created in Q2, 163 were force related, and of those, 32 (or 19.6%) included at least one threshold break for three or more uses of force in the preceding 30 days.

2019 Q3 Update:  The thresholds established by the Settlement Agreement remain in place.

In Q3 there were 409 alerts with a closure date between July 1st and September 30th and of those, 338, or 82.6%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted,” “Debriefing w/Employee,” or “EAP Referral” made up 122 of the 338, or 36%, of the alerts processed and closed at the RU level.

Of the 310 alerts created in Q3, 133 were force related, and of those, 16 (or 12%) included at least one threshold break for three or more uses of force in the preceding 30 days.

2019 Q4 Update:  The thresholds established by the Settlement Agreement remain in place.

In this quarter, there were 244 alerts, of which 119 were reviewed at the RU level.

Of the 146 force alerts generated in EIS, 30 alerts were sent to RU Managers for review. Eight (8) of the 30 force alerts included one or more CAT IV force type events that could have been declined if the EIS Administrator strictly adhered to the aforementioned amended ½ an event calculation. However, in following SOP #44 guideline that counts the CAT IV force event(s) that were reviewed at a higher category as a whole event instead of a ½, the EIS Administrator sent the eight alerts to RU Managers for review.

In addition to alert types and totals, this report also includes alerts closures. In Q4 there were 270 alerts with a closure date between October 1st and December 31st and of those, 138, or 51.1%, were reviewed by the member's RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted”, “Debriefing w/Employee”, or “EAP Referral,” made up 46 of the 138 (or 33%) alerts processed and closed at the RU level.

During the review of alerts for this report, additional analysis was conducted to examine the decrease in overall Alert totals for the quarter. While reviewing all alerts of 2019, PSD saw a significant increase in total alerts from Q1 to Q2 (336 vs. 435) and a notable

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decrease in overall alerts from Q3 to Q4 (310 vs. 244). Although no one cause was identified for the decrease in Q4, two alert types did see dramatic drops in threshold breaks from Q2 to Q4: Commendations and Traumatic Incidents. In Q2 there were 116 Commendation Alerts, and 119 Traumatic Incident Alerts while in Q4 there were 8 Commendations and 52 Traumatic Incidents. It is unknown what outside factors might have contributed to the spike in Traumatic Incidents in the second quarter, but PSD has concluded that a computer/downloading error between December 21st and 31st may have affected the overall total of Traumatic Incidents in Q4. Based on the previous year’s data, PSD estimates approximately 11 additional Traumatic Incident Alerts may have generated during the same date range in 2019, this would have resulted in the quarter’s total of 63 which is close to the current median number (71) of Traumatic Alerts in a quarter.
The spike in Commendation Alerts in Q2 is known, as it was the result of a backlog project assigned to a temporary employee in PSD. This project insured the entry of more than 1,500 backlogged commendations into the AIM database, which houses an officer’s Complaint & Commendation history and which downloads directly into EIS when the “Commendations” threshold has been met. This backlog project caused a dramatic spike in Commendation Alerts (116 in Q2; 53 in Q3) from the median number (102) of alerts in a quarter.

Based on this analysis, the PSD EIS Team has concluded the commendation backlog project, an identified program downtime, and the increased experience level of the EIS administrator in identifying and excluding “noise” reasonably account for the moderate change in alert totals in Q4. The PSD EIS Team will continue to track EIS Alerts for future reports, and will analyze additional statistical inconsistencies should they arise.

Item 119:
Of the 244 alerts created in Q4, 146 were force related and, of those, 14 (or 9.5%) included at least one threshold break for three or more uses of force in the preceding 30 days.

2020 Q1 Update: The thresholds established by the Settlement Agreement remain in place.

In this quarter, there were 267 alerts, of which 150 were reviewed at the RU level (56.2%).

Of the 157 force alerts, 43 alerts were sent to RU Managers for review. Thirteen (13) of the 43 force alerts included one or more CAT IV force type events that could have been declined if the EIS Administrator strictly adhered to the amended ½ an event calculation. However, by following SOP 44 guidelines to count the CAT IV force event(s) that were reviewed at a higher category as a whole event instead of a ½, the EIS Administrator sent the thirteen alerts to RU Managers for review.

In addition to alert types and totals, this report also includes alerts closures. In Q1 there were 245 alerts with a closure date between January 1st and March 31st. Of those, 129, or 52.7%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted” and “Debriefing w/Employee” made up 48, or 37%, of the 129 alerts processed and closed at the RU level.

Item 119:
Of the 267 alerts created in Q1, 157 were force related, and of those, 19 (or 12.1%) included at least one threshold break for three or more uses of force in the preceding 30 days.

2020 Q2 Update: The thresholds established by the Settlement Agreement remain in place.

Of those force alerts generated in EIS (180), 88 alerts were sent to RU Managers for review. Eight (8) of the 88 force alerts included one or more CAT IV force type events that could have been declined if the EIS Administrator strictly adhered to the aforementioned amended ½ an event calculation. However, by following SOP 44 guidelines to count the CAT IV force event(s) that were reviewed at a higher category as a whole event instead of a ½, the EIS Administrator sent the eight alerts to RU Managers for review.

In addition, there were 281 alerts with a closure date between April 1st and June 30th. Of those, 186, or 66.2%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted” and “Debriefing w/Employee” made up 76, or 41%, of the 186 alerts processed and closed at the RU level.
Despite fluctuation in those alerts strictly reviewed by the RU Manager and those reviewed by the employees’ supervisor, the percentage of alert interventions remains consistent at 40.9%.

119:
Of the 291 alerts created in the quarter, 180 were force-related, and of those, 39 (or 21.6%) included at least one threshold break for three or more uses of force in the preceding 30 days.

The number of alerts in this time period with at least one Force Count Threshold Break increased from 19 in Q1 to 39 in Q2. This is a 105% increase, and is the most for any quarter since PSD began tracking this information. Within the quarter, alerts with a Force Count Threshold Break occurred as follows: April had nine (9); May had two (2), and June had twenty-eight (28). The significant increase in June can most likely be attributed to the ongoing protests, however since PSD does not track the underlying specifics of force threshold breaks a direct correlation cannot be drawn by PSD.

2020 Q3 Update:
The thresholds established by the Settlement Agreement remain in place.
Of the 525 alerts generated in EIS this quarter, 340 alerts were reviewed at the RU level.
Of the 404 force alerts created, 241 were sent to RU managers for review.
Twenty-two (22) of the 241 force alerts included one or more CAT IV force type events that could have been declined if the EIS Administrator strictly adhered to the aforementioned amended ½ an event calculation. However, by following SOP 44 guidelines to count the CAT IV force event(s) that were reviewed at a higher category as a whole event instead of a ½, the EIS Administrator sent the 22 alerts to RU Managers for review.

In addition to alert types and totals, this report also includes alerts closures. In the third quarter, there were 512 alerts with a closure date between July 1st and September 30th and of those, 338, or 66.0%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted” and “Debriefing w/Employee” made up 84, or 25%, of the 338 alerts processed and closed at the RU level.
In this time period, there was a significant increase in those alerts closed by the RU Manager and a drop in overall interventions. The cause for this single quarter shift are unknown to the PSD EIS Team at this time. However, it should be noted that the PPB saw a significant number of personnel changes during this quarter, including multiple command staff changes at all three precincts. The PSD EIS Team will continue to track alert closures and provide further analysis should a new trend be identified.

Of the 404 force alerts, 153 (or 37.9%) included at least one threshold break for three or more uses of force in the preceding 30 days.

The number of alerts with at least one Force Count Threshold Break increased from 39 last quarter to 153 in this one. This is a 292% increase and is the most for any quarter since PSD began tracking this information. Within the quarter, alerts with a Force Count Threshold Break occurred as follows: July had seventy-seven (77); August had twenty-seven (27), and September had forty-nine (49). The significant increase can most likely be attributed to the ongoing protests/riots. However, since the PSD EIS Team does not track the underlying specifics of force threshold breaks, a direct correlation cannot be drawn.

2020 Q4 Update:
The thresholds established by the Settlement Agreement remain in place.
Of the 371 force alerts generated in EIS, 113 alerts were sent to RU Managers for review. Twenty-six (26) of the 113 force alerts included one or more CAT IV force type events that were reviewed at a higher category/whole event instead of a ½ an event, and were sent to RU Managers for review.
In addition to alert types and totals this report also includes alerts closures. There were 551 alerts with a closure date between October 1st and December 31st and of those, 277, or 50.3%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted” and “Debriefing w/Employee” made up 70, or 25%, of the 277 alerts processed and closed at the RU level.
Also included in this quarter’s supporting documents is a graph showing RU alert closures over time, the percentage of alerts reviewed and closed by the RU Manager, the percentage of alerts assigned to supervisors, and percentage of alert interventions. PSD has reported each quarter’s numbers separately since 2018 Q1. For this quarter, there continued to be a higher percentage (64.3%, 178/277) of alerts closed by the RU Manager than overall interventions (25.3%, 70/277). The PSD EIS Team will continue
Of the 526 alerts created in Q4, 371 were force related, and of those, 28 (or 7.5%) included at least one threshold break for three or more uses of force in the preceding 30 days.

**2021 Q1 Update:** The thresholds established by the Settlement Agreement remain in place.

Of the 423 alerts generated in EIS this quarter, 226 (53.4%) were sent to RU managers for review.

Of the total alerts (423), 281 were force alerts and 84 of those were sent to RU managers for review. Thirty-six (36) of the 84 force alerts included one or more CAT IV force type events that were reviewed at a higher category/whole event instead of a ½ an event.

In addition to alert types and totals, this report also includes alerts closures. In the quarter, there were 419 alerts with a closure date between January 1st and March 31st and of those, 237, or 56.6%, were reviewed by the member’s RU Manager before closure. Interventions, which included closure statuses of “Coaching Conducted” and “Debriefing w/Employee” made up 106, or 45%, of the 237 alerts processed and closed at the RU level.

In this quarter, there was a sharp decline in the percentage of alerts closed by the RU Manager without further review or interventions (30.8%, 142/237) over the fourth quarter of 2020 (64.3%, 178/277). Conversely, alerts closed in the quarter with some form of intervention increased (44.7%, 106/237) over Q4 2020 (25.3%, 70/277).

In the PSD EIS Team’s analysis, the decrease seen during this time period from the previous two quarters can be attributed to the decrease in total alerts generated within the quarter. PSD will continue to track alert closures and provide further analysis should new trends or anomalies be identified.

Of the 423 alerts created in Quarter 1, as noted 281 were force related. Of those, 36 (or 12.8%) included at least one threshold break for three or more uses of force in the preceding 30 days.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:

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Friday, May 7, 2021
Task Description
Additional EIS Administrator

Task Requirements: PPB will identify and train a second EIS administrator. This individual may be assigned to other tasks within the Professional Standards Division or as otherwise needed.

Status  Actively in Process

Action Steps:
1. PSD will work with Training Division to identify the opportunity for an EIS sergeant placed within the Training Division
2. Training division will advertise and select a sergeant for the position
3. Training Division and Professional Standards Division will develop an SOP memorializing the position and associated responsibilities with regard to EIS

Evidence of Completion:
1. Training Division Sergeant position announcement
2. EIS Administrator position announcement
3. Memo from PSD Sergeant Fender

Task Date Completed: 

Received DOJ Approval?: Approval

2014 Q1 Update: Position has been posted twice but received no responses. Will be posted again.

2014 Q2 Update: Training Division Sergeant Matt Stimmel has been designated as the second EIS administrator and will undergo the necessary training to serve as back-up.

2014 Q3 Update: Sergeant Stimmel continues to serve as the second EIS administrator and has received training in its use.

2014 Q4 Update: Sergeant Stimmel remains as the second EIS administrator. He is scheduled to meet with the primary EIS administrator every Wednesday to facilitate communication and promote consistency since he is stationed at the Training Center in NE Portland and the primary works at the Justice Center.

2015 Q1 Update: Effective March 1, 2015, Lt. Gorgone replaced Sgt. Stimmel as the second EIS administrator.

2015 Q2 Update: No change in the designation of the second EIS administrator.

2015 Q3 Update: There is no change to this item. Lt. Gorgone remains the second EIS Administrator.

Recent feedback from DOJ and COCL has mentioned the training of the EIS Administrators. Since EIS is a custom built program, there is no formal training outside of the Bureau that one could attend to learn how to use, manipulate or navigate the system. That knowledge is gained through on-the-job training. There was a period of overlap with the former EIS administrator when Sgt. Jensen took over this responsibility. PPB agrees that having well-trained EIS staff is important. To that end, Sgt. Jensen and Lt. Gorgone have attended various relevant trainings and continue to look for training seminars and conferences that would provide them additional insight into how to use EIS more effectively.

2015 Q4 Update: There is no change to this item. Lt. Gorgone remains the second EIS Administrator.

2016 Q1 Update: There is no change to this item. Lt. Gorgone remains the second EIS Administrator.

2016 Q2 Update: No personnel changes were made in this regard this quarter. Lt. Gorgone remains the second EIS Administrator.

2016 Q3 Update: Lt. Gorgone remains the second EIS Administrator.

Although this report generally covers activity in the 3rd quarter, it merits mentioning that PSD acquired a temporary employee just days into the 4th quarter. Sgt. Amanda McMillan has transferred into the division and will be here for the next several quarters. She will be learning the role of EIS Administrator with the goal of becoming an additional EIS Administrator. In addition, over the course of her time in PSD, it is expected that a reference library containing material that will supplement the on-the-job training will be created.

2016 Q4 Update: Lt. Gorgone remained the second EIS Administrator.
Sgt. Amanda McMillan transferred into the Professional Standards Division on a temporary basis and will be here for the next several months. She has been learning the role of EIS Administrator with the goal of becoming an additional EIS Administrator. Over the course of her time in PSD we expect to put together a reference library containing material that will supplement the on-the-job training and identify domains of knowledge necessary for successful functioning as an EIS Administrator.

**2017 Q1 Update:** Lt. Michael Fort transferred into the Professional Standards Division on February 9, 2017, replacing Lt. Bob Gorgone as the second EIS Administrator.

Sgt. Amanda McMillan, who previously transferred into the Professional Standards Division on a temporary basis on October 4, 2016, has replaced Sgt. Jake Jensen as the EIS Administrator. Over the past six months Sgt. McMillan had been learning the role of EIS Administrator with the goal of becoming an additional EIS Administrator. However, with Sgt. Jensen’s return to patrol, Sgt. McMillan has been assigned the role of primary EIS Administrator. Although Sgt. Jensen began work on a training manual and reference library, Sgt. McMillan is tasked with completing the project that will “supplement the on the job training and identify domains of knowledge necessary for successful functioning as an EIS Administrator.” This project is expected to be completed by the end of 2017 Q2.

Additionally, two specifically trained sergeants (Jake Jensen and Jenni Baxter) have rotated back to patrol, but are available as additional EIS Administrators, if the need arises. PSD intends to continue to rotate light duty sergeants into the role of additional EIS Administrators as they become available.

**2017 Q2 Update:** Lt. Michael Fort remained as the second EIS administrator during this quarter.

Further, Sgt. Jake Jensen and Sgt. Jenni Baxter, who previously served in the position, are detached administrators to be called upon if there is a sudden vacancy with the primary or secondary Administrator.

**2017 Q3 Update:** Lt. Mike Fort remains the secondary EIS Administrator.

Sgt. Amanda McMillan, Sgt. Jake Jensen, and Sgt. Jenni Baxter are detached EIS Administrators to be used if there is a sudden vacancy in the primary or secondary Administrator position.

**2017 Q4 Update:** Sergeant Paul Meyer remained the primary EIS Administrator with the PSD Lieutenant, Lt. Mike Fort, continuing as the secondary EIS Administrator.

Sgt. Amanda McMillan continues as a detached EIS Administrator to be used if there is a sudden vacancy within the primary or secondary Administrator positions.

**2018 Q1 Update:** With Lt. Michael Fort’s retirement in January 2018, PSD utilized Sergeant Greg Pashley as the acting Lieutenant for the EIS Team. In that capacity, Sgt. Pashley was trained on EIS Administrator duties and provided back-up/secondary support to Sergeant Paul Meyer as needed.

Lieutenant Jay Bates transferred to the Professional Standards Division on February 8, 2018, replacing Acting Lieutenant Pashley. Lt. Bates has begun training on EIS Administrator duties and will act as the second EIS Administrator.

Sgt. Meyer remained the primary EIS Administrator, with both Sgt. Pashley and Sergeant Amanda McMillan as back-up/secondary support of EIS Administrator duties as needed. Sgt. McMillan continues as a detached EIS Administrator to be used if there is a sudden vacancy within the primary or secondary Administrator positions.

**2018 Q2 Update:** Sgt. Meyer remained the primary EIS Administrator with Lt. Jay Bates filling the role of the secondary EIS Administrator. Sergeant Amanda McMillan continues as a detached EIS Administrator to be used if there is a sudden vacancy within the primary or secondary Administrator positions.

**2018 Q3 Update:** There was no change in EIS personnel. Sgt. Meyer remained the primary EIS Administrator with Lt. Jay Bates filling the role of the secondary EIS Administrator. Sergeant Amanda McMillan continues as a detached EIS Administrator to be used if there is a sudden vacancy within the primary or secondary Administrator positions.

**2018 Q4 Update:** Sgt. Meyer remained the primary EIS Administrator with Lt. Jay Bates filling the role of the secondary EIS Administrator. Sergeant Amanda McMillan continues as a detached EIS Administrator to be used if there is a sudden vacancy within the primary or secondary Administrator positions.
2019 Q1 Update: Sgt. Dan Spiegel joined the EIS Team on January 24, 2019 and became the primary EIS Administrator on February 11th with Sgt. Paul Meyer’s transfer to another Division. Lt. Jay Bates continues to fill the role of the secondary EIS Administrator. And Sgt. Meyer has will continue as a detached EIS Administrator (to be used if there is a sudden vacancy within the primary or secondary Administrator positions).

2019 Q2 Update: Sgt. Dan Spiegel continued as the primary EIS Administrator with Lt. Jay Bates filling the secondary administrator position.

2019 Q3 Update: Acting Lieutenant Nathan Sheppard joined the Professional Standards Division and EIS Team on July 11, 2019, becoming the secondary EIS Administrator within the division. Sgt. Dan Spiegel continues to fill the role of the primary EIS Administrator. Lt. Jay Bates and Sgt. Paul Meyer continue as detached EIS Administrators (to be used if there is a sudden vacancy within the primary or secondary Administrator positions).


2020 Q2 Update: Sgt. Spiegel remained the primary EIS Administrator with Lieutenant Nathan Sheppard, who joined PSD on July 11, 2019, continuing to fill the role of the secondary EIS Administrator. Acting Lieutenant Ronald Mason joined the PSD team on June 25, 2020, and will become the new permanent secondary EIS Administrator, as Lt. Sheppard will transfer to Central Precinct in July. Additionally, Capt. Jay Bates and Sgt. Paul Meyer remain available as detached EIS Administrators.

2020 Q3 Update: Sgt. Spiegel remained the primary EIS Administrator with Acting Lieutenant Ron Mason, who joined PSD on June 25, 2020, continuing to fill the role of the secondary EIS Administrator. Additionally, Lt. Nathan Sheppard remains available as a detached EIS Administrator if there is a sudden vacancy within the primary or secondary Administrator positions.

2020 Q4 Update: Sgt. Spiegel remained the primary EIS Administrator with Lieutenant Ron Mason continuing to fill the role of the secondary EIS Administrator. Additionally, Lt. Nathan Sheppard remains available as a detached EIS Administrator if there is a sudden vacancy within the primary or secondary Administrator positions.

2021 Q1 Update: Sgt. Spiegel remained the primary EIS Administrator with Lieutenant Ron Mason continuing to fill the role of the secondary EIS Administrator. Additionally, Lt. Nathan Sheppard remains available as a detached EIS Administrator if there is a sudden vacancy within the primary or secondary Administrator positions.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Task Description
Improved Investigation Timeline

Task Requirements: PPB and the City shall complete all administrative investigations of officer misconduct within one-hundred eighty (180) days of receipt of a complaint of misconduct, or discovery of misconduct by other means. For the purposes of this provision, completion of administrative investigations includes all steps from intake of allegations through approval of recommended findings by the Chief, including appeals, if any, to CRC. Appeals to CRC shall be resolved within 21 days.

Status Complete - pending external review

Action Steps:
1. PSD will establish new required timelines for personnel involved in administrative review of officer misconduct
2. PSD will produce graphs of all options for investigation and associated timelines

Task Date Completed: 2/15/2013

Evidence of Completion:
1. Flow charts for 7 types of investigation

Status Note:
2014 Q1 Update: PPB/IA continues to strive to meet the allotted timeframe. A number of investigations completed in this quarter fell outside the timeline.

2014 Q2 Update: Despite PPB/IA's stated goal, again a number of investigations were not completed within the allotted time. IA is in process of completing a comprehensive analysis of a year's worth of data with explanations and recommendations for system improvements to positively impact this performance outcome.

2014 Q3 Update: Once again, despite IA's stated goal, a significant number of investigations were not closed within the allotted 180 days. IA is examining the length of delay at each step of the process to determine what, if any, changes could be implemented to expedite the completion of the investigation.
IA is also just finishing its report on the timeframes for all closed 2013 Administrative Investigations which the Bureau will use as its baseline for future outcome measures.

2014 Q4 Update: IA's 2013 annual report indicated that it investigated 65 cases and 17 (26%) were completed in 180 days or less which is the DOJ's stated goal. This will serve as the baseline for the Bureau's future work in this area.
For the first half of 2014, IA had 26 cases and it has completed 16 of these investigations. Of the 16 completed cases, 5 (31%) were completed in under 180 days so improvement was noted. IA has made significant adjustments to the previous timeframes in its own unit to speed up the process. However, IA is now looking at the other PPB internal units involved in the process to see how their role might be expedited as well as potentially broader changes to the tracks of the current system without sacrificing the purpose or effect.

2015 Q1 Update: PPB/IA's initial tally for 2014 shows that 56 cases were investigated by IA. Twenty-six of those (46%) have been completed as of the end of this quarter. Of those completed cases, 13 or 50% met the 180 day timeline which is a significant improvement over 2013 but still far from the stated goal.
Thus PSD continues to analyze ways to expedite the process. It did so in a couple of arenas by taking 9 days off the time allotted for PRB and 7 off CHO's review time.
IPR has proposed City Code changes as well which would save a total of 39 days in its piece of the process. This was set for City Council review in March but was postponed at the request of interested parties who wanted additional time in which to comment.

2015 Q2 Update: This is still a work in progress. Chief O’Dea gave direction to all RU Managers and Executive Staff via memorandum on February 5th and May 19th, and to the DOJ on February 27th, regarding the 180 day timeline requirement specific to administrative investigations. As of this update, no formal steps have been taken specific to missed timelines (i.e., letter of expectation, performance investigation) besides the requirement for RU managers and Branch Assistant Chiefs to submit memorandums (to Chief O’Dea) when they have missed their allotted timelines, including EIS entries for those having missed timelines on administrative investigations assigned to them after February 5th.
For the 2nd Quarter of 2015, there were a total of 20 Administrative Investigations completed. Ten of those did not meet the 180
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Day timeline. Of the 20 investigations, the median total number of days to completion was 180 days. Of the 10 late investigations:
- IA was late 8 times on at least 1 track of the process
- IPR was late 9 times on at least 1 track (just info since PPB as no control over IPR and its timelines)
- The RU’s were late 6 times (East Precinct 4 times; Central Precinct 2 times)
- The CHO was late 3 times
- PRB process was late 1 time

The Median number of days in which all 10 investigations went over was 44.5

2015 Q3 Update: For the third quarter, there were thirteen (13) Administrative Investigations completed of which two (2) failed to meet the 180-day timeline. That represents 15% of the total (refer to Quarterly Stats Report) which is a significant improvement over past quarters. The delay on those cases occurred both at IPR and IA (for complete details see Administrative Investigations report).

DOJ has expressed a need for the City to address, in a more global fashion, IPR's and PSD's timelines, divisions of labor, and redundancies. To that end, there have been several meetings involving IA, IPR, the Auditor, the Mayor, and the City Attorney to address these concerns.

2015 Q4 Update: In the fourth quarter, there were 26 Administrative investigations closed, of which 15 met the 180 day timeline. The median number of days for those was 174.5. The delays for the 11 that missed the mark were attributable to both IPR and IA.

As noted previously, the stakeholders are in the process of addressing this issue and DOJ's overarching desire for a holistic look at the current accountability system and a plan for achieving compliance with Section VIII of the Agreement.

The City is engaged in a 4-step process to develop such a plan:
1. Convene a City Workgroup to map out the current system, identify barriers to compliance and find opportunities to simplify it in a way that increases fairness, effectiveness and accessibility for all stakeholders. (June 2015-Dec.2015)
2. Convene a focus group of key individuals involved with the officer accountability system, including community members who serve on civilian oversight bodies, to engage in frank discussion about current system and proposed improvements. (Jan. 2016-Apr. 2016)
3. Provide summaries of key discussion points to the Mayor, Auditor and Chief to inform development of compliance plan (Apr. 2016);
4. City publishes its plan to achieve compliance and solicits input from all interested parties, including the general public, DOJ, COCL, COAB and CRC. (TBD)

Although the City is engaged in a 4-step process to develop such a plan:

2016 Q1 Update: In the first quarter of 2016, there were a total of 17 administrative investigations closed. Of those investigations, 7 (41%) missed the 180 day timeline. The median duration for the cases closed was 156 days. Both IA and IPR were equally responsible for tardiness in 5 of the 7 cases. The Rus missed the timeline in 2 of the cases, and the Chief's office missed in 1 of them.

The second step in the holistic review process commenced this quarter. The Accountability Focus Group is made up of representatives from IA, IPR, CRC, and PRB. In addition, a police accountability advocate and a patrol officer are also part of the group. The group has met approximately seven times, and the last meeting is scheduled for May 18, 2016. At that meeting, the group plans to review the notes of their prior discussions with a goal of identifying issues where they reached consensus on potential solutions. Next step will be to send the group's written summaries to the police chief and Auditor for use in their development of a plan.

2016 Q2 Update: During this quarter, there were a total of 17 administrative investigations closed. Of those investigations, 7 missed the 180 day timeline, or 41%.
- Internal Affairs had overdue timelines in 5 of the 7 overdue cases, or 71%.
- The Us missed timelines in 1 of the 7 overdue cases, or about 14%.
- The Chief’s Office (CRC Challenge Review) missed timelines in 1 of the 7 overdue cases, or 14%.
- IPR missed timelines in 5 of the 7 overdue cases, or 71%.
- PRB missed timelines in 1 of the 7 overdue cases.
- CRC Appeal Window Timelines went over in 3 of the 7 cases.

The median duration of all the cases closed in the 2nd Quarter of 2016 was 173 days.
The Accountability Focus Group concluded its work by producing three basic concepts for the Portland City Council to consider. Of the three, the City Council has supported the one it feels will reduce the redundancies specifically in the area of appeals. This new plan was presented to the city council on July 1, 2016. The next step is for the Council to present this new proposal to the public in several different venues. The new plan with any additional suggestions by the public will be brought back before Council for a vote as Code changes will be required. In the interim, the Internal Affairs Directives will be reviewed and revised in anticipation of these changes.

**2016 Q3 Update:** For the 3rd Quarter of 2016, there were a total of 20 administrative investigations closed. Of those investigations, 9 missed the 180 day timeline, or 45%.
- Internal Affairs had overdue timelines in all 9 of the overdue cases, or 100%.
- The RU’s missed timelines in 6 of the 9 overdue cases, or 67%.
- The Chief’s Office missed timelines in 3 of the 9 overdue cases, or 33%.
- IPR missed timelines in 6 of the 9 overdue cases times, or 67%.
- PRB missed timelines in 0 of the 9 overdue cases.
- CRC Appeal Window Timelines went over in 5 of the 9 cases.
- The median duration of all the cases closed in the 3rd Quarter of 2016 was 176 days.

In Quarter 3 the proposed structure of the accountability system that City Council had accepted was vetted at a community forum. It was met with criticism and disapproval. IPR then proposed code changes which incorporated some elements of the proposed structure, but the code changes were not voted on by City Council. Council decided to table the matter at this time and indicated that a stakeholders group would be created that will meet in Quarter 4 to further discuss proposed changes to the system.

**2016 Q4 Update:** During the 4th quarter of 2016, there were a total of 25 administrative investigations closed. Of those investigations, 12 missed the 180 day timeline, or 48%.
- Internal Affairs had overdue timelines in 10 of the overdue cases, or 83%.
- The RU’s missed timelines in 3 of the 12 overdue cases, or 25%.
- The Chief’s Office missed timelines in 2 of the 12 overdue cases, or 17%.
- IPR missed timelines in 11 of the 12 overdue cases times, or 92%.
- PRB missed timelines in 0 of the 9 overdue cases.
- CRC Appeal Window Timelines went over in 3 of the 12 cases.
- The median duration of all the cases closed in the 3rd Quarter of 2016 was 171 days.

In this time period, a stakeholders group met twice in November, and discussed potential changes to the CRC. The scope of the discussion was limited to the following issues:
- Size of the CRC
- Size of appeals panels
- Taking public comment at appeals hearings
- Taking public comment at the case file review

The general consensus of the group was to increase the size of the CRC to at least 15 members and have appeal panels of no fewer than 5 members. The group agreed there should be public comment during the CRC appeal hearings, but there was no consensus as to whether the comments should be heard before or after the CRC reached a decision. The final report containing the recommendations can be found at [http://www.cdri.com/images/PDFs2016Forward/CRC_Appeals_StakeholderReport12_15_2016.pdf](http://www.cdri.com/images/PDFs2016Forward/CRC_Appeals_StakeholderReport12_15_2016.pdf) and a copy is included with the supporting documents. No action was taken on the recommendations in this report as yet.

**2017 Q1 Update:** During the first quarter of 2017, there were a total of 27 administrative investigations closed. Of those investigations, 19 missed the 180 day timeline, or 70%.
- Internal Affairs had overdue timelines in 19 of the 19 overdue cases, or 100%.
- The RU’s missed timelines in 4 of the 19 overdue cases, or 21%.
- The Chief’s Office missed timelines in 0 of the 12 overdue cases, or 0%.
- IPR missed timelines in 17 of the 19 overdue cases times, or 89%.
• PRB missed timelines in 3 of the 19 overdue cases, or 16%.
• CRC Appeal Window Timelines went over in 15 of the 19 overdue cases, or 79%.
• The median duration of all the cases close the first quarter of 2017 was 210 days, a 22% increase over the fourth quarter of 2016.

PSD/IA attributes these increases in both timeline and the median rates this quarter to the loss of three investigators by retirement or resignation. Only one replacement came on board in the quarter and that individual is in the process of being trained.

IPR worked with the Police Bureau, the City Attorney’s Office, and the Portland Police Association to revise IPR’s proposed code changes prior to a reading in front of City Council in the second quarter of 2017. Among other changes, the final proposal contained language that will prohibit public comment prior to the CRC making decisions in appeal cases and a provision which revises the SIO process. The proposal did not contain any changes which would arguably affect the length of time taken to investigate complaints of misconduct.

### 2017 Q2 Update:
For the 2nd Quarter of 2017, there were a total of 23 administrative investigations closed. Of those investigations, 15 missed the 180 day timeline, or 65%.
- Internal Affairs had overdue timelines in 15 of the 15 overdue cases, or 100%.
- The RU’s missed timelines in 3 of the 15 overdue cases, or 20%.
- The Chief’s Office missed timelines in 1 of the 15 overdue cases, or 7%.
- IPR missed timelines in 12 of the 15 overdue cases times, or 80%.
- PRB missed timelines in 0 of the 15 overdue cases, or 0%.
- CRC Appeal Window Timelines went over in 6 of the 15 overdue cases, or 40%.

The median duration of all the cases closed in the 2nd Quarter of 2017 was 211 days, nearly identical to the 1st Quarter of 2017 median duration of 210 days.

During this quarter, the code changes discussed in Q1 were passed by City Council, with the only significant change being the move from SIOs to Supervisory Investigations. Late in the quarter, the Police Bureau met with US DOJ, the PPA, the Auditor, the City Attorney’s Office and IPR to come to some consensus on what an overarching accountability system will look like. The parties developed a comprehensive plan to amend the settlement agreement, change City Code, and revise Police Bureau and IPR policies to mirror one another in order to build such a system.

Also in this quarter, PPB hired another IA investigator, bringing IA to 7 investigators but with 2 remaining openings. At the very end of the quarter, PPB added a second sergeant to IA to assist with the supervision of the investigators and provide some relief of the administrative load on the existing supervisory staff.

### 2017 Q3 Update:
For the third quarter, there were a total of 23 administrative investigations closed. Of those investigations, 10 missed the 180 day timeline, or 43%.
- Internal Affairs had overdue timelines in 10 of the 10 overdue cases, or 100%.
- The RU’s missed timelines in 4 of the 10 overdue cases, or 40%.
- The Chief’s Office missed timelines in 1 of the 10 overdue cases, or 10%.
- IPR missed timelines in 9 of the 10 overdue cases, or 90%.
- PRB missed timelines in 4 of the 10 overdue cases, or 40%.
- CRC Appeal Window Timelines went over in 4 of the 10 overdue cases, or 40%.

The median duration of all the cases closed in this quarter was 136 days, a decrease of more than 26% from the 2nd Quarter median duration of 211 days.

In this quarter, PPB worked with the DOJ, PPA, and IPR on revising the Bureau directives related to police accountability. IA also added two additional investigators bringing IA to a full staffing of nine investigators. The administrative support position, which had been authorized in July 2016 but had been open since then, was finally filled as well. Both of these additions have given IA further capacity to investigate cases and process administrative tasks.
For the 4th Quarter of 2017, there were a total of 23 administrative investigations closed. Of those investigations, 8 missed the 180 day timeline, or 35%.

- Internal Affairs had overdue timelines in 8 of the 8 overdue cases, or 100%.
- The RU’s missed timelines in 1 of the 8 overdue cases, or 13%.
- The Chief’s Office missed timelines in 0 of the 8 overdue cases, or 0%.
- IPR missed timelines in 6 of the 8 overdue cases times, or 75%.
- PRB missed timelines in 3 of the 8 overdue cases, or 38%.
- CRC Appeal Window Timelines went over in 0 of the 8 overdue cases, or 0%.

The median duration of all the cases closed in the 3rd Quarter of 2017 was 160 days, an increase of less than 3% from the 3rd Quarter median duration of 156 days.

Further, in this quarter, IA continued to evaluate each overdue case to identify systemic causes of delay.

During this quarter, there were a total of 28 administrative investigations closed. Of those investigations, 15 missed the 180 day timeline, or 54%.

- Internal Affairs had overdue timelines in 12 of the 15 overdue cases, or 80%.
- The RU’s missed timelines in 4 of the 15 overdue cases, or 26.6%.
- The Chief’s Office missed timelines in 4 of the 15 overdue cases, or 26.6%.
- IPR missed timelines in 12 of the 15 overdue cases times, or 80%.
- PRB missed timelines in 6 of the 15 overdue cases, or 40%.
- CRC Appeal Window Timelines went over in 3 of the 15 overdue cases, or 13%.

The median duration of all the cases closed in the 4th Quarter of 2017 was 193 days, an increase of about 20.6% from the 4th Quarter median of 160 days.

During this time frame, IA has continued to implement strategies to reduce systemic delays. Although the overall number of overdue cases increased, as did the overall time to complete the case, much of this is outside the control of PPB. Typically, our investigations are the source of the greatest delays under the control of PPB. As an example of how our strategies have begun to take effect, our overdue investigations in 2017 Q3 had a median of 112 extra days. In 2017 Q4 it was down to 42 extra days, and in this quarter, that number was down to just 8 extra days.

For the 2nd Quarter of 2018, there were a total of 33 administrative investigations closed. Of those investigations, 13 missed the 180 day timeline, or 39%.

- Internal Affairs had overdue timelines in 8 of the 13 overdue cases, or 62%.
- The RU’s missed timelines in 5 of the 13 overdue cases, or 38%.
- The Chief’s Office missed timelines in 4 of the 13 overdue cases, or 31%.
- IPR missed timelines in 12 of the 13 overdue cases times, or 92%.
- PRB missed timelines in 6 of the 13 overdue cases, or 40%.
- CRC Appeal Window Timelines went over in 1 of the 13 overdue cases, or 8%.

The median duration of all the cases closed in the second quarter was 170 days, a decrease of about 12% from the 1st Quarter median duration of 190 days.

IA not only continues to try to reduce the number of investigations that are overdue but also the total number of days that an investigation is overdue. In Q2 the median was 18 extra days which was a slight uptick from last quarter. However, there were only half as many overdue investigations in Q2 than in the prior three quarters.

For the 3rd Quarter of 2018, there were a total of 58 administrative investigations closed. Of those investigations, 10 missed the 180 day timeline, or 17%.

- Internal Affairs had overdue timelines in 8 of the 10 overdue cases, or 80%.
• The RU’s missed timelines in 1 of the 10 overdue cases, or 10%.
• The Chief’s Office missed timelines in 4 of the 10 overdue cases, or 40%.
• IPR missed timelines in 9 of the 10 overdue cases, or 90%.
• BHR missed timelines in 1 of the 10 overdue cases, or 10%
• PRB missed timelines in 4 of the 10 overdue cases, or 40%.
• The Detective Division missed timelines in 5 of the 10 overdue cases, or 50%.

The median duration of all the cases closed in the 3rd Quarter was 113 days, a decrease of about 34% from the 2nd Quarter median duration of 170 days.

Refer to the Q3 Stats Report for further details.

In this time period, PPB initiated the process of having the IA Investigators do the recommended findings. The transition to this process has been fairly seamless. The investigators have been and continue to be very thoughtful when applying officer actions to policy and formulating their findings.

Additionally, during this quarter PPB instituted a collaborative process (with the DA’s Office, IPR, the Detective Division and IA) to triage criminal complaints in a more expeditious manner. Although a new process, IA expects it will substantially reduce the amount of time a criminal complaint takes to be investigated by the Detective Division and reviewed by the DA’s Office. This, in turn, should assist IA in conforming to the prescribed timelines more regularly where there is a concurrent criminal investigation.

**2018 Q4 Update:**

In this quarter, there were a total of 51 administrative investigations closed, of which 21 were supervisor investigations. Of all 51 investigations, 11 missed the 180 day timeline, or approximately 22%.

• Internal Affairs had overdue timelines in 9 of the 11 overdue cases, or 81%.
• The RU’s missed timelines in 2 of the 11 overdue cases, or 18%.
• The Chief’s Office missed timelines in 4 of the 11 overdue cases, or 36%.
• IPR missed timelines in 8 of the 11 overdue cases, or 73%.
• BHR missed timelines in 0 of the 11 overdue cases, or 0%
• PRB missed timelines in 5 of the 11 overdue cases, or 45%.
• The Detective Division missed timelines in 4 of the 11 overdue cases, or 36%.

The median duration of all the cases closed in the 4th Quarter of 2018 was 133 days, an increase of about 17% from the 3rd Quarter of 113 days.

**2019 Q1 Update:**

During the first quarter of 2019, Internal Affairs closed a total of 46 administrative investigations. However, following discussions with the COCL during Q1 it was decided that the appeal window should be excluded from the 180 day timeline. After implementing the new time accounting process, IA discovered that it caused one case that had been completed on time and four cases that had exceeded the 180 day timeline to retroactively close in Q4 of 2018. The 180 day memos for the aforementioned overdue cases (2018-C-0163, 2018-C-0196, 2018-C-0207, and 2018-C-0216) will be provided with this report along with an amended stats report for Q4 of 2018.

• For the 1st Quarter of 2019, there were a total of 41 administrative investigations closed, of which 16 were supervisor investigations. Of the 41 investigations, 9 missed the 180 day timeline, or approximately 22%.
• Internal Affairs had overdue timelines in 9 of the 9 overdue cases, or 100%.
• The RU’s missed timelines in 5 of the 9 overdue cases, or 55%.
• The Chief’s Office missed timelines in 5 of the 9 overdue cases, or 55%
• IPR missed timelines in 8 of the 9 overdue cases, or 88%.
• BHR missed timelines in 3 of the 9 overdue cases, or 33%
• PRB missed timelines in 5 of the 9 overdue cases, or 55%.
• The Detective Division missed timelines in 2 of the 9 overdue cases, or 22%.

The median duration of all the cases closed in the 1st Quarter of 2019 was 119 days, a decrease of about 12% from the 4th Quarter median duration of 135.5 (amended) days.

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**2019 Q2 Update:** For the 2nd Quarter, Internal Affairs closed a total of 60 administrative investigations. The 180 day memos for the aforementioned overdue cases (2018-B-0019, 2018-B-0027, and 2018-B-0067) will be provided with this report.

- Of the 60 administrative investigations closed, 19 were supervisor investigations.
- Of the 60 investigations, 3 missed the 180 day timeline, or approximately 5%.
- Internal Affairs had overdue timelines in 3 of the 3 overdue cases, or 100%.
- The RU’s missed timelines in 2 of the 3 overdue cases, or 66%.
- The Chief’s Office missed timelines in 2 of the 3 overdue cases, or 66%.
- IPR missed timelines in 3 of the 3 overdue cases, or 100%.
- BHR missed timelines in 1 of the 3 overdue cases, or 33%
- PRB missed timelines in 2 of the 3 overdue cases, or 66%.
- The Detective Division missed timelines in 0 of the 3 overdue cases, or 0%.

The median duration of all the cases closed in the second quarter was 84 days, a decrease of about 29% from the 1st Quarter median duration of 119 days.

**2019 Q3 Update:** During the 3rd Quarter of 2019, Internal Affairs closed a total of 48 administrative investigations. The 180 day memos for the aforementioned overdue cases (2018-B-0056 and 2018-B-0068) will be provided with this report.

There were a total of 48 administrative investigations closed, of which 22 were supervisor investigations. Of all 48 investigations, 2 missed the 180 day timeline, or approximately 4%.

- Internal Affairs had overdue timelines in 1 of the 2 overdue cases, or 50%.
- The RU’s missed timelines in 0 of the 2 overdue cases, or 0%.
- The Chief’s Office missed timelines in 2 of the 2 overdue cases, or 100%.
- IPR missed timelines in 1 of the 2 overdue cases, or 50%.
- BHR missed timelines in 0 of the 2 overdue cases, or 0%
- PRB missed timelines in 1 of the 2 overdue cases, or 50%.
- The Detective Division missed timelines in 2 of the 2 overdue cases, or 100%.

The median duration of all the cases closed in the 3rd Quarter of 2019 was 89.5 days, an increase of about 7% from the 2nd Quarter median duration of 84 days.

**2019 Q4 Update:** For the 4th Quarter of 2019, there were a total of 57 administrative investigations closed, of which 20 were supervisor investigations. Of all 57 investigations, none missed the 180 day timeline.

**2020 Q1 Update:** During the first quarter of 2020, Internal Affairs closed a total of 50 administrative investigations, of which 14 were supervisor investigations. Of all 50 investigations, only 1 missed the 180 day timeline, or 2%. The 180 day memo for the one overdue case (2019-B-0025) will be provided with this report.

- Both Internal Affairs and IPR had overdue timelines in the 1 overdue case.
- The RU’s, the Chief's Office, HR, Detective Division and PRB did not miss their timelines in the 1 overdue case.

The median duration of all the cases closed in the first quarter was 74 days, a decrease of about 24% from the 4th quarter of 2019 median duration of 98 days.

**2020 Q2 Update:** In this quarter, Internal Affairs closed a total of 33 administrative investigations, of which 3 were Supervisor Investigations. Of all 33 investigations, none missed the 180 day timeline.

**2020 Q3 Update:** During the 3rd Quarter of 2020, Internal Affairs closed a total of 38 administrative investigations. One of the investigations was overdue. The 180 day memo for the overdue case (2019-C-0366) will be provided with this report.

- For the 3rd Quarter of 2020, there were a total of 38 administrative investigations closed, of which 10 were supervisor investigations. Of all 38 investigations, only 1 missed the 180 day timeline, or 3%.
- Internal Affairs had overdue timelines in the 1 overdue case, or 100%.
- The RU’s missed timelines in 0 of the 1 overdue case, or 0%.
- The Chief’s Office missed timelines in 0 of the 1 overdue case, or 0%.
- IPR missed timelines in 0 of the 1 overdue case, or 0%.
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- BHR missed timelines in 0 of the 1 overdue case, or 0%
- PRB missed timelines in 0 of the 1 overdue case, or 0%
- The Detective Division missed timelines in 0 of the 1 overdue case, or 0%
- The median duration of all the cases closed in the 3rd Quarter of 2020 was 90.5 days, an increase of approximately 4% from the 2nd Quarter of 2020 median duration of 87 days.

2020 Q4 Update: During the 4th quarter, Internal Affairs closed a total of 56 administrative investigations. The 180 day memo for the one overdue case (2019-B-0069) will be provided with this report.
  - There were a total of 56 administrative investigations closed, of which 10 were supervisor investigations. Of all 56 investigations, only 1 missed the 180 day timeline, or 1.7%.
  - Internal Affairs had overdue timelines in the 1 overdue case, or 100%.
  - The RU’s missed timelines in 1 of the 1 overdue case, or 100%.
  - The Chief’s Office missed timelines in 1 of the 1 overdue case, or 100%.
  - IPR missed timelines in 0 of the 1 overdue case, or 0%.
  - PRB missed timelines in 0 of the 1 overdue case, or 0%.
  - Training Division missed timelines in 1 of the 1 overdue case, or 100%.
  - The Detective Division missed timelines in 1 of the 1 overdue case, or 100%.
  - The median duration of all the cases closed in the 4th Quarter of 2020 was 100 days, an increase of about 11.7% from the 3rd Quarter median duration of 90.5 days.

2021 Q1 Update: In this quarter, Internal Affairs closed a total of 43 administrative investigations. Of those forty three cases, six were overdue. The 180 day memos for the six overdue cases (2020-B-0044, 2020-C-0159, 2020-C-0162, 2020-C-0210, 2020-C-0239 and 2020-C-0339) will be provided with this report.
  - There were a total of 43 administrative investigations closed, of which 8 were supervisor investigations. Of all 43 investigations, 6 missed the 180 day timeline, or 14%.
  - Internal Affairs had at least one overdue timeline in the 4 of the overdue cases, or about 66%.
  - The RU’s missed timelines in 3 of the 6 overdue cases, or 50%.
  - The Chief’s Office missed timelines in 2 of the 6 overdue case, or about 33%.
  - IPR missed timelines in 5 of the 6 overdue cases, or about 83%.
  - BHR missed timelines in 1 of the 6 overdue case, or about 16%.
  - PRB (to include the drafting of the facilitator memo) missed timelines in 2 of the 6 overdue case, or about 33%.
  - No Training Division timelines were overdue on any of the overdue cases for this quarter.
  - No Detectives Division timelines were overdue on any of the overdue cases for this quarter.
  - The median duration of all the cases closed in the 1st Quarter of 2021 was 102 days, an increase of about 2% from the 4th Quarter median duration of 100 days.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

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Task Description
Concurrent administrative and criminal investigations

Task Requirements:
PPB shall conduct administrative investigations concurrently with criminal investigations, if any, concerning the same incident. All administrative investigations shall be subject to appropriate tolling periods as necessary to conduct a concurrent criminal investigation, or as otherwise provided by law, or as necessary to meet the CRC or PRB recommendation to further investigate.

Status
Complete - pending external review

Action Steps:
1. Create/Update IA SOP #7: Deadly Force and In-Custody Death Investigations
2. Create/update IA SOP #30: Concurrent Administative/Criminal Investigations
3. Report on implementation of these SOPs

Evidence of Completion:
1. IA SOP #7 (updated)
2. IA SOP #30 (new)

Task Date Completed: 10/4/2013

Received DOJ Approval? Approval

Status Note:
2014 Q1 Update: This is now standard operating procedure so used in each investigation this quarter.
2014 Q2 Update: This is the protocol in each investigation.
2014 Q3 Update: This continues to be IA's practice pursuant to SOPs #7 and #30.
2014 Q4 Update: IA continues to use this protocol with each investigation.
2015 Q1 Update: IA continues to follow this practice with each investigation.
2015 Q2 Update: IA is conducting concurrent investigations pursuant to its relevant SOP.
2015 Q3 Update: In this quarter, there were six (6) Criminal Investigations which IA also investigated (refer to Criminal-IA Concurrent Investigation Audit report)
• 2015-B-0021 Criminal Investigation 7/6/15 – IA Investigation 7/14/15
• 2015-C-0201 Criminal Investigation 7/6/15 – IA Investigation 7/10/15
• 2015-C-0273 Criminal Investigation 9/4/15 – SIO 9/25/15
• 2015-C-0275 Criminal Investigation 8/19/15 – IA declined 9/25/15 (no violation of Bureau Directives)
• 2015-C-0276 Criminal Investigation 9/4/15 – IA Investigation 9/11/15
• 2015-C-0305 Criminal Investigation 9/14/15 – IA Investigation 10/1/15 (tolling period necessary due to criminal investigation)

2015 Q4 Update: There were 3 concurrent criminal and IA investigations initiated in the 4th quarter of 2015.
- 2015-B-0031, Criminal initiated 11/6/15 - IA initiated 11/16/15
*2015-C-0336, Criminal initiated 11/3/15 - IA initiated 12/1/15
- 2015-C-0378, Criminal initiated 12/18/15 – IA initiated 12/30/15

* The venue of the criminal investigation was in the State of Washington. Both the investigating agency as well as the DA requested that we (PPB IA) not commence our interviews until their investigation was completed and a determination of whether or not charges would be filed was made.

2016 Q1 Update: There were 7 concurrent criminal and IA investigations initiated in the 4th quarter of 2015:
• 2016-B-0003, Criminal Initiated 02/16/2016, IA initiated 04/06/2016
• 2016-C-0008, Criminal Initiated 01/06/2016, IA initiated 01/05/2016
• 2016-C-0035, Criminal Initiated 02/09/2016, IA initiated 02/09/2016
• 2016-C-0043, Criminal Initiated 02/22/2016, IA initiated 02/22/2016
• 2016-C-0070, Criminal Initiated 03/25/2016, IA initiated 03/09/2016
• 2016-C-0085, Criminal Initiated 03/23/2016, IA initiated 03/23/2016

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2016 Q2 Update: PPB had 4 concurrent criminal and IA investigations initiated in the 2nd quarter of 2016.
• 2016-B-0010, Criminal Initiated 04/25/2016, IA Initiated 04/25/2016
• 2016-B-0015, Criminal Initiated 05/25/2016, IA Initiated 05/25/2016
• 2016-C-0107, Criminal Initiated 04/01/2016, IA Initiated 03/31/2016
• 2016-C-0147, Criminal Initiated 04/22/2016, IA Initiated 04/22/2016

The IA captain continues to communicate on a weekly basis with the Commander of the Detectives Division or the lead RU to obtain updated information regarding the status of any criminal investigation. In the cases with outside jurisdictions in charge of the investigation, a liaison is chosen to speak weekly with the investigating agency for updates. This includes either direct or communicated information from the DA recommending/inquiring whether or not IA should move forward with compelled interviews.

2016 Q3 Update: PPB had 4 concurrent criminal and IA investigations initiated in the 3rd quarter of 2016.
• 2016-B-0025, Criminal Initiated 07/27/2016, IA Initiated 07/27/2016
• 2016-C-0235, Criminal Initiated 07/1/2016, IA Initiated 07/1/2016
• 2016-C-0267, Criminal Initiated 07/29/2016, IA Initiated 07/29/2016
• 2016-C-0283, Criminal Initiated 07/16/2016, IA Initiated 08/19/2016

Due to personnel changes with the CHO and the PSD Captain, IAD was not notified of this case until 8/19/2016, at which time a concurrent administrative investigation was opened.

The IA Captain continues to communicate on a weekly basis with the Commander of the Detectives Division or the lead RU to obtain updated information regarding the status of any criminal investigation. In the cases with outside jurisdictions in charge of the investigation, a liaison is chosen to speak weekly with the investigating agency for updates. This includes either direct or communicated information from the DA recommending/inquiring whether or not IA should move forward with compelled interviews.

2016 Q4 Update: PPB had 8 concurrent criminal and IA investigations initiated in the 4th quarter of 2016.
• 2016-C-0345, Criminal Initiated 10/4/16, IA Initiated 10/4/16
• 2016-C-0346, Criminal Initiated 10/6/16, IA Initiated 10/4/16
• 2016-B-0037, Criminal Initiated 10/28/16, IA Initiated 10/28/16
• 2016-C-0350, Criminal Initiated 10/20/16, IA Initiated 10/10/16
• 2016-C-0355, Criminal Initiated 10/19/16, IA Initiated 10/18/16
• 2016-C-0358, Criminal Initiated 10/6/16, IA Initiated 10/6/16
• 2016-C-0368, Criminal Initiated 10/26/16, IA Initiated 10/26/16
• 2016-C-0383, Criminal Initiated 11/8/16, IA Initiated 11/7/16

The IA captain continues to communicate on a weekly basis with the commander of the Detectives Division, or the lead RU, to obtain updated information regarding the status of any criminal investigation. In the cases with outside jurisdictions in charge of the investigation, a liaison is chosen to speak weekly with the investigating agency for updates. This includes either direct or communicated information from the DA recommending/requesting whether or not IA should move forward with compelled interviews. Refer to the Criminal-IA Concurrent Inv Audit from Quarter 4.

2017 Q1 Update: PPB had 5 concurrent criminal and IA investigations initiated in the 1st quarter of 2017.
• 2017-B-0006, Criminal Initiated 2/9/17, IA Initiated 2/9/17
• 2017-B-0007, Criminal Initiated 2/9/17, IA Initiated 2/9/17
• 2017-C-0006, Criminal Initiated 2/23/17, IPR Initiated 1/9/17--this was an IPR intake. IPR did not provide it to IA to refer to Detectives until 2/23/17
• 2017-C-0015, Criminal Initiated 1/24/17, IA Initiated 1/24/17
• 2017-C-0023, Criminal initiated 1/30/17, IA initiated 1/7/17—it took a couple days to decide if the case should be opened and referred to Detectives.

For case 2017-C-0006, the case originated at IPR, and it was referred to Detectives once IPR had uncovered allegations of potentially criminal conduct.

For case 2017-C-0023, the case was criminally investigated by uniformed personnel at the time of the complaint. Once referred to Detectives, they determined no additional criminal investigation was necessary. While AIM dates reflect the Detective Division’s review process, the criminal case was technically initiated and completed (appropriately so) before IA was even notified.

The IA captain continues to communicate on a weekly basis with the commander of the Detectives Division, or the lead RU to obtain updated information regarding the status of any criminal investigation. In the cases with outside jurisdictions in charge of the investigation a liaison is chosen to speak weekly with the investigating agency for updates. This includes either direct or communicated information from the DA recommending/requesting whether or not IA should move forward with compelled interviews.

The Bureau is currently working on revisions to directive 1010.10, which will address concurrent investigation practices in officer-involved shootings.

2017 Q2 Update: PPB had 14 concurrent criminal and IA investigations initiated in the 2nd quarter of 2017.

• 2017-B-0028, Criminal initiated 5/10/17, IA initiated 5/10/17
• 2017-B-0029, Criminal initiated 5/28/17, IA initiated 5/28/17
• 2017-C-0109, Criminal initiated 4/19/17, IA initiated 4/19/17
• 2017-C-0110, Criminal initiated 4/19/17, IA initiated 4/19/17
• 2017-C-0134, Criminal initiated 5/16/17, IA initiated 5/16/17
• 2017-C-0140, Criminal initiated 5/20/17, IA initiated 5/23/17
• 2017-C-0141, Criminal initiated 4/15/17, IA initiated 5/25/17
• 2017-C-0147, Criminal initiated 5/25/17, IA initiated 5/9/17
• 2017-C-0150, Criminal initiated 6/14/17, IA initiated 6/5/17
• 2017-C-0151, Criminal initiated 6/5/17, IA initiated 6/5/17
• 2017-C-0156, Criminal initiated 6/8/17, IA initiated 6/8/17
• 2017-C-0161, Criminal initiated 6/9/17, IA initiated 6/9/17
• 2017-C-0163, Criminal initiated 6/13/17, IA initiated 6/13/17
• 2017-C-0180, Criminal initiated 6/28/17, IA initiated 6/28/17

For case 2017-C-0147 and Case 2017-C-0150, the case originated at IPR, was referred to IA, and then IA referred the case to Detectives.

For case 2017-C-0141, Detectives failed to notify IA. As soon as IA was notified, the administrative case was opened.

The IA captain continues to communicate on a weekly basis with the commander of the Detectives Division, or the lead RU to obtain updated information regarding the status of any criminal investigation. In the cases with outside jurisdictions in charge of the investigation, a liaison is chosen to speak weekly with the investigating agency for updates. This includes either direct or communicated information from the DA recommending/requesting whether or not IA should move forward with compelled interviews.

The Bureau is currently working on revisions to directive 1010.10, which will address concurrent investigation practices in officer-involved shootings.

2017 Q3 Update: PPB had 8 concurrent criminal and IA investigations initiated in the 3rd quarter of 2017.

• 2017-B-0034, Criminal initiated 8/10/17, IA initiated 8/10/17
• 2017-B-0036, Criminal initiated 8/30/17, IA initiated 8/30/17

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2017-C-0202, Criminal initiated 7/21/17, IA initiated 7/21/17
• 2017-C-0225, Criminal initiated 8/30/17, IA initiated 8/16/17
• 2017-C-0245, Criminal initiated 8/27/17, IA initiated 8/27/17
• 2017-C-0301, Criminal initiated 9/14/17, IA initiated 9/27/17
• 2017-C-0302, Criminal initiated 9/29/17, IA initiated 10/16/17
• 2017-C-0304, Criminal initiated 9/24/17, IA initiated 10/16/17

For case 2017-C-0225, the case originated at IPR. After the initial investigation review, they realized the complaint alleged potentially criminal behavior and referred the case to Detectives. The case was eventually dismissed by IPR without ever being referred to IA.

For cases 2017-C-0301, 2017-C-0302, and 2017-C-0304, Detectives failed to notify IA when they were notified of the potential criminal behavior. As soon as IA was notified, the administrative cases were opened. These cases all came in during a vacation by the Detective Division Commander. The acting commander was an employee who has since retired from the police bureau. The new accountability directives, once they are in place, provide very clear direction about the need to immediately notify IA upon notification of potential criminal behavior.

The IA captain continues to communicate on a weekly basis with the commander of the Detectives Division, or the lead RU to obtain updated information regarding the status of any criminal investigation. In the cases with outside jurisdictions in charge of the investigation a liaison is chosen to speak weekly with the investigating agency for updates. This includes either direct or communicated information from the DA recommending/requesting whether or not IA should move forward with compelled interviews.

2017 Q4 Update: PPB had 4 concurrent criminal and IA investigations initiated in the 4th quarter of 2017:
• 2017-B-0042, Criminal initiated 10/25/17, IA initiated 10/25/17
• 2017-C-0313, Criminal initiated 10/25/17, IPR initiated 10/25/17
• 2017-C-0332, Criminal initiated 11/6/17, IPR initiated 11/2/17
• 2017-C-0335, Criminal initiated 11/6/17, IA initiated 11/2/17

For case 2017-C-0332, IPR took the complaint on 11/2/17 and opened it on that date. They referred the case to IA late in the day on 11/3/17, which was a Friday. That referral to IA was copied to the Detective division, as well. IA did not open the criminal case in AIM until the following Monday, 11/6/17, when the criminal case was assigned to an investigator.

For case 2017-C-0335, when assigned out on 11/2/17, the complaint was not initially considered to be criminal in nature. When one of the IA sergeants pointed out on 11/6/17 that the complaint could be interpreted that way, IA referred the case to detectives at that time. That division declined to investigate the case but IA always opens a criminal case in AIM to document the referral and track the response from detectives.

2018 Q1 Update: PPB had 17 concurrent criminal and IA investigations initiated in the 1st quarter of 2018:
• 2016-C-0407, Criminal initiated 2/14/18, IPR initiated 12/1/16
• 2018-B-0013, Criminal initiated 3/7/18, IA initiated 3/6/18
• 2018-B-0014, Criminal initiated 3/8/18, IA initiated 3/8/18
• 2018-B-0017, Criminal initiated 3/19/18, IA initiated 3/19/18
• 2018-C-0001, Criminal initiated 2/28/18, IA initiated 1/2/18
• 2018-C-0014, Criminal initiated 1/22/18, IA initiated 1/22/18
• 2018-C-0030, Criminal initiated 1/25/18, IA initiated 1/25/18
• 2018-C-0031, Criminal initiated 1/25/18, IA initiated 1/25/18
• 2018-C-0044, Criminal initiated 1/31/18, IA initiated 1/31/18
• 2018-C-0056, Criminal initiated 2/12/18, IA initiated 2/12/18
• 2018-C-0060, Criminal initiated 2/20/18, IA initiated 2/20/18
• 2018-C-0061, Criminal initiated 2/21/18, IA initiated 2/21/18
• 2018-C-0064, Criminal initiated 2/22/18, IA initiated 2/22/18
• 2018-C-0077, Criminal initiated 3/7/18, IA initiated 3/7/18
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2018-C-0087, Criminal initiated 3/14/18, IA initiated 3/13/18
· 2018-C-0089, Criminal initiated 3/15/18, IA initiated 3/15/18
· 2018-C-0102, Criminal initiated 3/28/18, IA initiated 3/28/18

For case 2016-C-0407, criminal issues were brought up by the complainant after the case had been through a CRC hearing and were investigated at that time.
For case 2018-C-0001, the potential criminal issues were not discovered until after the administrative investigation had been started.

2018 Q2 Update: PPB had 15 concurrent criminal and IA investigations initiated in the 2nd quarter of 2018:
· 2018-B-0023, Criminal initiated 4/7/18, IA initiated 4/7/18
· 2018-B-0024, Criminal initiated 4/20/18, IA initiated 4/20/18
· 2018-B-0033, Criminal initiated 5/23/18, IA initiated 5/23/18
· 2018-B-0039, Criminal initiated 6/28/18, IA initiated 6/28/18
· 2018-C-0012, Criminal initiated 4/10/18, IPR initiated 1/11/18
· 2018-C-0107, Criminal initiated 4/4/18, IA initiated 4/4/18
· 2018-C-0122, Criminal initiated 4/10/18, IA initiated 4/10/18
· 2018-C-0134, Criminal initiated 5/31/18, IPR initiated 4/25/18
· 2018-C-0147, Criminal initiated 5/7/18, IA initiated 5/7/18
· 2018-C-0163, Criminal initiated 5/14/18, IA initiated 5/14/18
· 2018-C-0169, Criminal initiated 6/15/18, IA initiated 5/21/18
· 2018-C-0176, Criminal initiated 5/29/18, IA initiated 5/29/18
· 2018-C-0194, Criminal initiated 5/18/18, IA initiated 5/18/18
· 2018-C-0196, Criminal initiated 6/11/18, IA initiated 6/11/18
· 2018-C-0087, Criminal initiated 6/28/18, IA initiated 6/28/18

For case 2018-C-0012, criminal issues were not considered until after witnesses were interviewed as part of the administrative investigation.
For case 2018-C-0134, IPR took the complaint on 4/10/18, but they did not refer the criminal allegations to detectives until 5/31/18.
For case 2018-C-0169, IPR took the complaint on 5/21/18, but they did not refer the criminal allegation to detectives until 6/14/18.

2018 Q3 Update: PPB had 8 concurrent criminal and IA investigations initiated in the 3rd quarter of 2018:
· 2018-B-0056, Criminal initiated 8/31/18, IA initiated 8/31/18
· 2018-B-0059, Criminal initiated 9/30/18, IA initiated 9/30/18
· 2018-C-0199, Criminal initiated 7/13/18 IPR initiated 6/13/18
· 2018-C-0234, Criminal initiate 7/15/18, IA initiated 7/16/18
· 2018-C-0289, Criminal initiated 8/21/18, IPR initiated 8/21/18
· 2018-C-0294, Criminal initiated 9/4/18, IA initiated 9/4/18
· 2018-C-0300, Criminal initiated 9/7/18, IA initiated 9/7/18
· 2018-C-0303, Criminal initiated 9/7/18, IPR initiated 9/7/18

For case 2018-C-0199, IPR received the complaint on 6/13/18, but did not refer the criminal allegations to detectives until 7/13/18.

For case 2018-C-0234, Detectives received the complaint on Sunday, 7/15/18 and IA initiated the case on Monday, 7/16/18.

2018 Q4 Update: PPB had 11 concurrent criminal and IA investigations initiated in this quarter:
· 2018-B-0062, Criminal initiated 10/10/18, IA initiated 10/10/18
· 2018-B-0068, Criminal initiated 10/19/18, IA initiated 10/19/18
· 2018-B-0072, Criminal initiated 11/1/18, IA initiated 11/1/18

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2019 Q1 Update: PPB had 10 concurrent criminal and IA investigations initiated in the 1st Quarter of 2019:

- 2019-B-0001, Criminal initiated 01/02/19, IA initiated 01/02/19
- 2019-B-0002, Criminal initiated 01/06/19, IA initiated 01/06/19
- 2019-B-0017, Criminal initiated 03/08/19, IA initiated 03/08/19
- 2019-B-0019, Criminal initiated 03/28/19, IA initiated 02/14/19
- 2019-C-0021, Criminal initiated 01/17/19, IA initiated 01/17/19
- 2019-C-0049, Criminal initiated 02/20/19, IA initiated 02/20/19
- 2019-C-0052, Criminal initiated 02/20/19, IA initiated 02/23/19
- 2019-C-0067, Criminal initiated 03/06/19, IA initiated 03/06/19
- 2019-C-0077, Criminal initiated 03/17/19, IA initiated 03/17/19

In regards to 2019-C-0049, the case involved a criminal complaint against a member whose employment had been terminated several years prior. As such it was initially decided that an administrative investigation would not be conducted. However, it was later determined that it was necessary to compel a witness member for an interview in order to complete the criminal investigation. This lead to IA opening an administrative case about three months after Detectives had started their investigation. Given that the involved member is no longer employed by the Bureau, the IA case will likely be administratively closed.

2019 Q2 Update: PPB had 6 concurrent criminal and IA investigations initiated in the 2nd Quarter.

- 2019-B-0026, Criminal initiated 04/29/19, IA initiated 04/29/19
- 2019-B-0037, Criminal initiated 06/09/19, IA initiated 06/09/19
- 2019-C-0114, Criminal initiated 04/22/19, IA initiated 04/22/19
- 2019-C-0116, Criminal initiated 04/22/19, IA initiated 04/22/19
- 2019-C-0131, Criminal initiated 05/03/19, IA initiated 05/03/19
- 2019-C-0181, Criminal initiated 06/24/19, IA initiated 06/21/19

In regards to 2019-C-0181, the complainant brought forward an allegation of a criminal nature after the investigation had been initiated by IPR.

2019 Q3 Update: PPB had 15 concurrent criminal and IA investigations initiated in the 3rd Quarter of 2019.

- 2019-B-0047, Criminal initiated 07/30/19, IA initiated 07/30/19
- 2019-B-0058, Criminal initiated 09/09/19, IA initiated 09/09/19
- 2019-C-0142, Criminal initiated 07/01/19, IA initiated 05/17/19*
- 2019-C-0185, Criminal initiated 07/01/19, IA initiated 07/01/19
- 2019-C-0196, Criminal initiated 07/05/19, IA initiated 07/05/19
- 2019-C-0204, Criminal initiated 07/10/19, IA initiated 07/10/19
- 2019-C-0207, Criminal initiated 08/01/19, IA initiated 08/01/19
- 2019-C-0218, Criminal initiated 07/22/19, IA initiated 07/22/19
- 2019-C-0240, Criminal initiated 07/23/19, IA initiated 08/07/19*
- 2019-C-0245, Criminal initiated 08/13/19, IA initiated 08/13/19
- 2019-C-0270, Criminal initiated 09/04/19, IA initiated 09/04/19
- 2019-C-0278, Criminal initiated 09/09/19, IA initiated 09/19/19
In regards to 2019-C-0142, an IPR Investigation, the complainant brought forward an allegation of a criminal nature after the administrative investigation had been initiated by IPR.

In regards to 2019-C-0240, the Detective Division, in a rare oversight, mistakenly failed to notify IA in a timely manner about a criminal investigation of a member.

In regards to 2019-C-0310, the complainant made a criminal allegation. IPR notified IA and the case was referred to the Family Services Division. However, IPR did not open a concurrent administrative investigation. When the oversight was discovered, IA consulted with IPR and IA opened an Administrative Investigation.

2019 Q4 Update: PPB had 8 concurrent criminal and IA investigations initiated in the 4th Quarter of 2019.
- 2019-B-0066, Criminal initiated 11/15/19, IA initiated 11/15/19
- 2019-B-0069, Criminal initiated 12/08/19, IA initiated 12/08/19
- 2019-C-0344, Criminal initiated 10/22/19, IA initiated 10/22/19
- 2019-C-0366, Criminal initiated 11/15/19, IA initiated 11/15/19
- 2019-C-0372, Criminal initiated 11/25/19, IA initiated 11/25/19
- 2019-C-0378, Criminal initiated 12/05/19, IA initiated 12/05/19
- 2019-C-0386, Criminal initiated 11/26/19, IA initiated 11/26/19
- 2019-C-0403, Criminal initiated 12/24/19, IA initiated 12/24/19

2020 Q1 Update: PPB had 10 concurrent criminal and IA investigations initiated in the 1st quarter of 2020.
- 2020-C-0007, Criminal initiated 01/13/20, IA initiated 01/13/20
- 2020-C-0014, Criminal initiated 01/17/20, IA initiated 01/17/20
- 2020-C-0016, Criminal initiated 01/22/20, IA initiated 01/22/20
- 2020-C-0030, Criminal initiated 02/07/20, IA initiated 02/07/20
- 2020-C-0042, Criminal initiated 02/21/20, IA initiated 02/21/20
- 2020-C-0052, Criminal initiated 02/24/20, IA initiated 02/24/20
- 2020-C-0053, Criminal initiated 03/01/20, IA initiated 03/01/20
- 2020-C-0061, Criminal initiated 03/19/20, IA initiated 03/19/20
- 2020-C-0065, Criminal initiated 03/26/20, IA initiated 03/26/20
- 2020-C-0066, Criminal initiated 03/30/20, IA initiated 03/30/20

2020 Q2 Update: PPB had 6 concurrent criminal and IA investigations initiated in this quarter:
- 2020-B-0039, Criminal initiated 06/28/20, IA initiated 06/28/20
- 2020-C-0077, Criminal initiated 04/15/20, IA initiated 04/15/20
- 2020-C-0088, Criminal initiated 05/04/20, IA initiated 05/04/20
- 2020-C-0097, Criminal initiated 05/12/20, IA initiated 05/12/20
- 2020-C-0117, Criminal initiated 06/08/20, IA initiated 06/08/20
- 2020-C-0156, Criminal initiated 06/26/20, IA initiated 06/26/20

2020 Q3 Update: The criminal and administrative investigations for case 2020-C-0225 were not congruent due to fact the criminal allegation was discovered after IPR had already opened the case. While IPR was conducting the intake process the complainant described an allegation of a criminal nature.
- 2020-C-0192, Criminal initiated 07/23/20, IA initiated 07/23/20
- 2020-C-0193, Criminal initiated 07/23/20, IA initiated 07/23/20
- 2020-C-0197, Criminal initiated 07/22/20, IA initiated 07/22/20
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2020 Q4 Update: PPB had ten concurrent criminal and IA investigations initiated in the fourth quarter:

• 2020-B-0066, Criminal initiated 12/24/20, IA initiated 12/24/20
• 2020-C-0245, Criminal initiated 10/09/20, IA initiated 09/09/20
• 2020-C-0279, Criminal initiated 10/20/20, IA initiated 10/14/20
• 2020-C-0280, Criminal initiated 12/02/20, IA initiated 10/16/20
• 2020-C-0294, Criminal initiated 12/02/20, IA initiated 09/23/20
• 2020-C-0295, Criminal initiated 11/13/20, IA initiated 11/13/20
• 2020-C-0300, Criminal initiated 11/25/20, IA initiated 11/25/20
• 2020-C-0304, Criminal initiated 11/25/20, IA initiated 11/25/20
• 2020-C-0308, Criminal initiated 12/06/20, IA initiated 12/06/20
• 2020-C-0324, Criminal initiated 12/21/20, IA initiated 12/21/20

For cases 2020-C-0245, 2020-C-0280, and 2020-C-0294 the criminal allegations came to light a month or more after IPR had opened the complaints. For 2020-C-0279, the criminal allegation came to light during the intake process, after the case had been initially opened.

2021 Q1 Update: PPB had 13 concurrent criminal and IA/IPR investigations initiated in the 1st Quarter of 2021.

• 2020-C-0187, Criminal initiated 01/07/21, IPR initiated 06/26/20
• 2020-C-0188, Criminal initiated 01/07/21, IPR initiated 06/26/20
• 2020-C-0234, Criminal initiated 01/07/21, IPR initiated 06/30/20
• 2020-C-0284, Criminal initiated 01/13/21, IA initiated 10/20/20
• 2020-C-0285, Criminal initiated 01/12/21, IA initiated 10/20/20
• 2021-B-0005, Criminal initiated 02/09/21, IA initiated 03/17/21
• 2021-B-0010, Criminal initiated 02/26/21, IA initiated 02/26/21
• 2021-B-0011, Criminal initiated 02/27/21, IA initiated 02/27/21
• 2021-B-0015, Criminal initiated 03/31/21, IA initiated 03/31/21
• 2021-C-0004, Criminal initiated 01/19/21, IA initiated 01/19/21
• 2021-C-0012, Criminal initiated 01/22/21, IA initiated 01/22/21
• 2021-C-0027, Criminal initiated 03/02/21, IA initiated 03/02/21
• 2021-C-0031, Criminal initiated 03/30/21, IA initiated 03/05/21

For the 2020 cases listed above, criminal allegations were brought forward by the DA’s office well after IA or IPR had opened the complaints. For 2021-B-0005, Detectives initially declined to look at the case criminally. However, after additional information was obtained by IA, the incident was looked at by Narcotics investigators who again declined further investigation. Finally for 2021-C-0031, it was decided after the case had been opened to refer the matter to the DA’s office to ensure any possible criminal conduct was addressed.

2021 Q2 Update:  
2021 Q3 Update:  
2021 Q4 Update:  

Friday, May 7, 2021
Inability to meet timeline targets analysis

Task Requirements: If PPB is unable to meet timeframe targets for administrative investigations, it shall undertake and provide to DOJ a written review of the IA process, to identify the source of the delays and implement an action plan for reducing them.

Status: Actively in Process

Action Steps:
1. IA will create new SOP identifying how the division will review and analyze whether internal investigations are being completed within required time limits
2. PSD will report resulting analysis and identify opportunities for improvement
3. PPB Leadership will review PSD recommendations for improvement and report on implementation of recommendations or report why implementation was not pursued

Task Date Completed:

Evidence of Completion:
1. Draft PSD SOP #29
2. Analyses of cases not meeting 180-day requirement

Status Note:
2014 Q1 Update: Captain Famous has provided reports on each of the investigations that did not meet the 180 day timeline with explanation for delay at each relevant step of the process.

2014 Q2 Update: IA continues to provide a report on each of the investigations that did not meet the 180 day timeframe with the reason for delay at each applicable step in the process.

2014 Q3 Update: Captain Famous provided a report on each of the investigations that did not meet the 180 day timeframe with the reason for the delay at each step of the process. Efforts continue to explore ways to reduce the delays, looking at both the individuals involved and the overall system. IA is identifying patterns that continue to arise in the delays and is addressing those.

2015 Q1 Update: Captain Famous continued to submit a report on each of the investigations that did not meet the 180 day timeline with reason(s) for delay as they became available.

An action plan addressing various decision points in the process continues to be developed to assist in reducing the delays. As noted in Action item #121 PSD took 9 days off the time allotted for PRB and 7 off CHO's review time. Other options are being pursued as well including an examination of the RU manager's response time and a new protocol regarding that piece is expected in April.

2015 Q2 Update: As mentioned under Item 21, Chief O'Dea has given direction regarding timelines and potential consequences for those not meeting them to all RU Managers and Executive Staff. This message has also been reiterated by the Branch Assistant Chiefs to their leadership, as evidenced by the timely submissions of memoranda of late to the Chief and EIS entries made in the responsible party's Discussion Tracker (when applicable).

Insofar as an Action Plan, Chief O’Dea has advised that formal accountability measures will be taken, if necessary, against those RU Managers and executive staff members who do not meet the allotted timelines on any IA or IPR-generated investigation entirely initiated after February 5th, 2015.

2015 Q3 Update: As noted in item 121, in the 3rd quarter there were only two (2) Administrative Investigations that did not meet the 180-day timeline. Both of these had delays at both IA and IPR. The IA missed timelines are documented in the attached memoranda with the reasons for the delays and proposed remedies.

2015 Q4 Update: As noted in item 121, there were 11 investigations that did not meet the required timeline this quarter. They each involved delays at IPR and IA. The cases in which IA missed timelines are documented in the memoranda included in the supporting documents with the reasons for the delays and proposed remedies.

Friday, May 7, 2021
2016 Q1 Update: As reported in item 121, there were 7 investigations that did not meet the required timeline for this quarter. They each involved delays at IPR and IA. The cases in which IA missed the mark are documented in the memoranda included in the supporting documents folder for this item with the reasons for the delays and proposed remedies.

2016 Q2 Update: As reported in item 121, there were 7 cases that did not meet the 180 day timeline. Five of these were delays at the IPR and IA stages. Each case was looked at individually and the reason for not meeting the timelines was documented in a memo to the Chief of Police. The Captain of PSD also included his proposed remedies for the Chief.
• Refero supporting document folder containing 2016 Q2 written memoranda
• Refer to Administrative Investigations Report

2016 Q3 Update: As reported in item 121, there were 9 cases that did not meet the 180 day timeline. All 9 of these cases had delays at the IPR and IA stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included his proposed remedies for the Chief.

2016 Q4 Update: As reported in item 121, there were 12 cases that did not meet the 180 day timeline. Ten of those cases had delays during at least one of the IA stages, and 11 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included for the Chief his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for Quarter 4.

2017 Q1 Update: As reported in item 121, there were 19 cases that did not meet the 180 day timeline. All of these cases had delays during at least one of the IA stages, and 17 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included for the Chief his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for Quarter 1.

SSD is currently working on a more rigorous analysis of data gathered to date. We will report any results from this work as they become available.

2017 Q2 Update: As reported in item 121, there were 15 cases that did not meet the 180 day timeline. All of these cases had delays during at least one of the IA stages, and 12 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included for the Chief his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for Quarter 2.

SSD is currently working on a more rigorous analysis of data gathered to date. Initial results (received after the end of Quarter 2) seem to be in line with the anecdotal qualitative analysis from the memos. We will report the final results from this work next quarter.

2017 Q3 Update: As reported in item 121, there were 10 cases that did not meet the 180 day timeline. All of these cases had delays during at least one of the IA stages, and 9 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included for the Chief his proposed remedies (Refer to the written memoranda and the Administrative Investigations Report for Quarter 3).

SSD completed a more rigorous analysis of data gathered to date. The initial report on the results seems to be in line with the anecdotal qualitative analysis from the memos.

2017 Q4 Update: As noted in item 121, there were 8 cases that did not meet the 180 day timeline. All of these cases had delays during at least one of the IA stages, and 6 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included for the Chief his proposed remedies.

2018 Q1 Update: As reported in item 121, there were 15 cases that did not meet the 180 day timeline. Twelve of these cases had delays during at least one of the IA stages, and 12 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included for the Chief his proposed remedies.

2018 Q2 Update: As reported in item 121, there were 13 cases that did not meet the 180 day timeline. Eight (8) of these cases had delays during at
least one of the IA stages, and 12 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines documented in a memo to the Chief of Police. The Captain of PSD also included for the Chief his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for this quarter.

**2018 Q3 Update:** As reported in Paragraph 121, there were 10 cases that did not meet the 180 day timeline. Eight of these cases had delays during at least one of the IA stages, and 9 had delays during at least one of the IPR stages.

Each case was looked at individually and the reason for failure to meet the timelines was documented in a memo to the Chief of Police. The memo also included proposed remedies to address the problem.

**2018 Q4 Update:** As noted in item 121, there were 11 cases that did not meet the 180 day timeline. Nine of these cases had delays during at least one of the IA stages, and 8 had delays during at least one of the IPR stages.

Each case was looked at individually and the reason for missing the timeline was documented in a memo to the Chief of Police. The Commander of PSD also included his proposed remedies for the Chief's consideration. Please refer to the written memoranda and the Administrative Investigations Report for Quarter 4.

**2019 Q1 Update:** As reported in paragraph 121, there were 9 cases that did not meet the 180 day timeline. Each of the 9 cases had delays during at least one of the IA stages, and 8 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines was documented in a memo to the Chief of Police. The Commander of PSD also included for the Chief his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for Quarter 1, 2019.

**2019 Q2 Update:** As reported in item 121, there were 3 cases that did not meet the 180 day timeline. Each of the 3 cases had delays during at least one of the IA stages, and 3 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines was documented in a memo to the Chief of Police. The Commander of PSD also included for the Chief his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for Quarter 2, 2019.

**2019 Q3 Update:** As reported in item 121, there were 2 cases that did not meet the 180 day timeline. One of the 2 cases had delays during at least one of the IA stages, and 1 had delays during at least one of the IPR stages. Each case was looked at individually and the reason for not meeting the timelines was documented in a memo to the Chief of Police. The Commander of PSD also included for the Chief his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for Quarter 3, 2019.

**2019 Q4 Update:** All cases closed in the fourth quarter were completed within the 180 day time frame.

**2020 Q1 Update:** In the first quarter of 2020 all but 1 of 50 cases were closed within 180 days. This case had delays during 3 stages under the direction of IA that exceeded timelines. Furthermore, this case had a delay during one IPR stage. The case was reviewed and the reasons for not meeting the timelines was documented in a memo to the Chief of Police. The Commander of PSD also included his proposed remedies for the Chief.

**2020 Q2 Update:** All cases closed by Internal Affairs in this quarter were closed within 180 days so no review under this paragraph was necessary.

**2020 Q3 Update:** In the third quarter, all but 1 of 38 cases were closed within 180 days. This case had delays during 1 stage under the direction of IA that exceeded timelines. The case was reviewed and the reasons for not meeting the timelines were documented in a memo to the Chief of Police. The Commander of PSD also included for the Chief his proposed remedies

**2020 Q4 Update:** During this quarter, all but 1 of 56 cases were closed within 180 days. This case had a delay at one stage under the direction of IA that exceeded timelines. Furthermore, this case had a delay during the RU findings and Deputy Chief’s finding stages and most significantly at the Training Analysis stage. The case was reviewed and the reasons for not meeting the timelines was documented in a memo to the Chief of Police. The Commander of PSD also included for the Chief, his proposed remedies.

**2021 Q1 Update:** In this quarter, all but 6 of 43 cases were closed within 180 days. The majority of the overdue cases saw significant delays of well over a month in the IPR intake process. The cases have been reviewed and the reasons for not meeting the timelines have documented in a memo to the Chief of Police. The Commander of PSD also included for the Chief, his proposed remedies. Refer to the written memoranda and the Administrative Investigations Report for Quarter 1, 2021.

**2021 Q2 Update:**

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2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
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Task Description
On Scene Public Safety Statements and Interviews

Task Requirements: City and PPB shall review its protocols for compelled statements to PSD and revise as appropriate so that it complies with applicable law and current professional standards, pursuant to Garrity v. New Jersey, 385 U.S. 493 (1967). The City will submit the revised protocol to DOJ for review and approval.

PLEASE NOTE THIS ADDITIONAL REQUIREMENT: Within 45 days of obtaining DOJ’s approval, PPB shall ensure that all officers are advised on the revised protocol.

Status Actively in Process

Action Steps:
1. PPB will change the policy associated with on scene review of an incident
2. Detectives Division will ensure changes to internal SOPs regarding detective interviews on scene
3. PPB will submit changes to Directives and/or SOP to DOJ for approval
4. PPB will alert community, stakeholders, and PPB employees of change and allow for comment
5. PPB will incorporate feedback and finalize policy within 45 days of DOJ approval

Evidence of Completion:

Task Date Completed: Yes

Evidence of Completion:

Status Note:

2014 Q1 Update: PPB is initiating its review of its protocols for compelled statements.

2014 Q2 Update: PPB has found no inconsistencies with its protocol and the Garrity standard. PSD is in the process of creating a SOP that references the applicable law and standards. The City will provide that document to DOJ.

2015 Q1 Update: PSD is still working with the Detectives Division on this SOP. A meeting with all the relevant stakeholders including the District Attorney, the Union and the Chief's office has been set to promulgate this procedure.

2015 Q2 Update: All involved parties continue to have work to do in this arena. Nothing has been finalized as yet.

2015 Q3 Update: This continues to be an area of dispute between DOJ and the City as evidenced by DOJ's comments in its periodic compliance status assessment. The parties agree that a meeting is required to address the concerns of both and to come to some resolution of this matter. The first of these meetings was held in October.

2015 Q4 Update: All the stakeholders are engaged in the effort to resolve this issue but the solution has yet to be determined. The City Attorney and DOJ met in person during a DOJ visit and email correspondence continued thereafter. The Multnomah County DA's office was involved in communication with DOJ as well. Further discussions are planned to work out a protocol that is acceptable to all involved.

2016 Q1 Update: Discussions are continuing between all stakeholders. The parties achieved greater clarity regarding Oregon law and how to mitigate the risks of improperly granting transactional immunity. Parties continue to work on a global resolution.

2016 Q2 Update: City Council is still evaluating a global resolution. Meanwhile, City and DOJ will discuss changes to Directive 1010.10 which should occur by year's end.

2016 Q3 Update: This issue remains outstanding. The parties have agreed to delay any attempt at resolution of this sticking point until Directive 1010.00 and its associated policies are finalized. The hope is that this will occur in the fourth quarter.

2016 Q4 Update: City and PPA amended its collective bargaining agreement to remove the "48-hr" rule for compelled statements.

2017 Q1 Update: This issue continued to rear its head as the PPB and DOJ worked on the Bureau's force policy. Despite coming to general
agreement on the terms of Directive 1010.00, the DOJ was unwilling to issue its approval of the policy until 1010.10 was addressed.

So finally representatives from the PPB, local and D.C. DOJ, the City Attorney’s office, the Mayor’s office and the Multnomah County District Attorney met face-to-face in March for a block of time to discuss the positions of the stakeholders involved in deadly force cases. The Multnomah County DA provided an overview of the applicable statutes, case law and practices that are unique to Oregon and Multnomah County. He provided a memorandum from the Oregon Department of Justice in support of his position. The result of the meeting was clear guidance to PPB as to the procedure to be followed in these types of cases for purposes of policy development and clarity for DOJ as to what to expect when a draft of 1010.10 is forwarded. DOJ will await its receipt before opining further. The parties are hoping to resolve this issue in the next quarter so that the suite of force policies may be enacted and trained.

2017 Q2 Update: After further face-to-face meetings that included the City, local and D.C. DOJ, PPA, Multnomah County District Attorney and Mayor’s staff, all parties finally came to agreement on this outstanding issue so that the Bureau can move forward on the suite of force policies and be able to train to them at Fall In-service. Thus PPB was able to finalize its Directive 1010.10 and forward it to DOJ. DOJ, in turn, gave the City provisional approval pending the City and Court’s approval of the proposed amendments to the Settlement agreement. This is necessary to gain DOJ’s approval of the force policies because this revised policy does not comport with the current requirements of the Settlement Agreement.

2017 Q3 Update: The policy that was finalized by the parties last quarter ran into unforeseen circumstances after it was signed on July 21, 2017 and posted to read and acknowledge with an anticipated enactment date of August 19, 2017. DOJ’s final approval of this directive was contingent on an amendment to the Settlement Agreement. That amendment, as well as the others that the parties had negotiated, were the subject of an ordinance presented to the City Council on August 9th. The Council rejected the agreed-upon version of 1010.10 and directed the PPB to rescind it. The Bureau did so on August 11th with directions to its members to revert to the former policy previously in effect—the December, 2014 version. The City and PPB then quickly crafted a revised 1010.10 that reflected the Council’s direction. That was reviewed and approved by Council on August 24th and subsequently posted for members’ reading and acknowledgment on August 29th with an effective date of September 27th.

That version is now in effect.

However, the Multnomah County District Attorney has serious concerns about the effect of the policy on his ability to prosecute if a “bad” shoot occurs as does the US Attorney for Oregon. Thus, the parties have scheduled a series of meetings to draft SOPs to create a “wall” between the administrative investigation conducted by IA and the criminal investigation performed by the Detectives Division so as not to jeopardize a potential prosecution.

Final approval of the directive now in effect is contingent on the success of that effort.

2017 Q4 Update: The meetings between the District Attorney, City Attorney and PPB resulted in the creation and enactment of SOPs that are instructive to members of the Bureau with regard to compelled statements under Directive 1010.10 that protect the integrity of the criminal investigation to the satisfaction of all parties.

2018 Q1 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2018 Q2 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2018 Q3 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2018 Q4 Update: The pertinent SOP remains in effect and was followed in the four OIS that occurred this quarter.

2019 Q1 Update: The pertinent SOP remains in effect and was followed in the OIS’s that occurred this quarter.

2019 Q2 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2019 Q3 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2019 Q4 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2020 Q1 Update: The pertinent SOP remains in effect. However, there was no OIS in this quarter.

2020 Q2 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2020 Q3 Update: The pertinent SOP remains in effect. However, there was no OIS in this quarter.
2020 Q4 Update: The pertinent SOP remains in effect and was followed in the OIS that occurred this quarter.

2021 Q1 Update: The pertinent SOP remains in effect. However, there was no OIS in this quarter.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:

2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
Task Description: Communications Restriction Orders

Task Requirements: Separation of all witness and involved officers to lethal force events is necessary in order to safeguard the integrity of the investigation of that event. Immediately following any lethal force event, PPB shall continue to issue a communication restriction order (“CRO”) to all witness and involved officers, prohibiting direct or indirect communications between those officers regarding the facts of the event. The CRO will continue, unless extended further, until the conclusion of the Grand Jury or, if no Grand Jury is convened, until a disposition is determined by the District Attorney.

Status: Actively in Process

Action Steps:
1. Update Internal Affairs SOPs to ensure that Communication Restriction Orders (CROs) and separation of witnesses is policy
2. Update Detectives Division SOPs to ensure the process for issuing CROs meets the requirements in the Agreement

Task Date Completed: Received DOJ Approval?

Evidence of Completion:
1. IA SOP #7 (located in folder #122)
2. IA SOP #30 (located in folder #122)

2014 Q1 Update: This process was utilized by PPB in the lethal force event that occurred in March, 2014 near Wilson High School.

2014 Q2 Update: A CRO was implemented by PPB in the lethal force event that occurred in April, 2014.

2014 Q3 Update: This process was followed after the lethal force event that occurred near I-84 on September 1, 2014.

2014 Q4 Update: This remains the PPB's standard operating procedure for any lethal force events but was not implicated this quarter as no such event occurred.

2015 Q1 Update: This protocol was followed after the lethal force event that took place in March, 2015.

2015 Q2 Update: CROs were put into place after each of the two lethal force events that occurred this quarter.

2015 Q3 Update: Two CROs were issued after the lethal force event that took place in July.

2015 Q4 Update: The protocol for the issuance of CROs was followed after the lethal force event that took place on November 6, 2015. Seventeen CROs were served.

2016 Q1 Update: This remains the PPB’s standard operating procedure for any lethal force event but was not implemented this quarter as no such event occurred.

2016 Q2 Update: The protocol for the issuance of CROs was followed after the officer-involved shooting that took place on May 24, 2016. Thirty-four CROs were served.

2016 Q3 Update: This remains the PPB’s standard operating procedure for any lethal force event but was not implemented this quarter as no such event occurred.

2016 Q4 Update: The protocol for the issuance of CROs was followed after the officer-involved shooting that took place on December 6, 2016. Eleven CROs were served.

2017 Q1 Update: The protocol for the issuance of CROs was followed after both of the officer-involved shootings that took place on February 9, 2017.

In the first OIS involving Quanice Hays, 17 CROs were issued.

In the second OIS involving Mr. Perkins that day, 5 CROs were issued.

2017 Q2 Update: The protocol for the issuance of CROs was followed after the officer-involved shooting in May.

2017 Q3 Update: The protocol for the issuance of CROs was followed after the officer-involved shooting on August 30, 2017. Three CROs were issued.

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served.

2017 Q4 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting on October 25, 2017.  Seven CROs were served.

2018 Q1 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting on March 8, 2018.  Ten (10) CROs were served.

2018 Q2 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting on April 8, 2018.  Nineteen CROs were served on PPB officers.  (One was issued to a Multnomah County Sheriff by that department).

2018 Q3 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting on September 30, 2018.  Four CROs were served on PPB officers.

2018 Q4 Update:  The protocol for the issuance of CROs was followed after all four officer-involved shootings in which PPB was involved:
On Oct 9, 2018, one CRO was served on a PPB officer.
On Oct 10, 2018, fifteen CROs were served on PPB officers.
On Nov 22-23, 2018, four CROs were served.
On Dec 7, 2018, twenty-one CROs were issued.

2019 Q1 Update:  The protocol for the issuance of CROs was followed after both of the officer-involved shootings in which PPB was involved this quarter:
On January 6, 2019, five CROs were issued.
On January 3, 2019, two CROs were issued.

2019 Q2 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting this quarter:
On April 29, 2019, eight CROs were issued.

2019 Q3 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting this quarter:
On July 30, 2019, fifteen CROs were issued.

2019 Q4 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting this quarter:
On December 8, 2019, four CROs were issued.

2020 Q1 Update:  There was no OIS this quarter so no CROs were issued.

2020 Q2 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting this quarter:
On June 28, 2020, three CROs were issued.

2020 Q3 Update:  There was no OIS this quarter so no CROs were issued.

2020 Q4 Update:  The protocol for the issuance of CROs was followed after the officer-involved shooting this quarter:
In the first hour of December 25, 2020, three CROs were issued.

2021 Q1 Update:  There was no OIS this quarter so no CROs were issued.

2021 Q2 Update:  

2021 Q3 Update:  

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Task Description
Lethal force on-scene witness officer briefings

Task Requirements:
PPB shall continue to require witness officers to lethal force events to give an on-scene briefing to any supervisor and/or a member of the Detective Division to ensure that victims, suspects, and witnesses are identified, evidence is located, and provide any information that may be required for the safe resolution of the incident, or any other information as may be required.

Status
Complete - pending external review

Action Steps:
1. PSD will ensure that bureau policies meet the requirements of this provision

Task Date Completed: 10/4/2013

Evidence of Completion:
1. IA SOP #7 (located in folder #122)
2. IA SOP #30 (located in folder #122)

Status Note:

2014 Q1 Update: This process was followed in officer-involved shooting of suspect near Wilson High School in March, 2014.
2014 Q2 Update: This requirement was followed in the officer-involved shooting on April 16, 2014
2014 Q3 Update: This requirement was followed in the officer-involved shooting of suspect on I-84 on September 1, 2014.
2014 Q4 Update: This procedure remains in effect for use in any lethal force event.
2015 Q1 Update: This procedure was utilized at the scene of the officer-involved shooting of a suspect in March, 2015.
2015 Q2 Update: This was done by Operations and/or Detectives at the scene of each of the two officer-involved shootings this quarter.
2015 Q3 Update: This procedure was not followed in the July OIS because the witness officer who sustained an injury was taken to the hospital.
2015 Q4 Update: This process was utilized following the OIS in November. One of the witness officers who had been at the scene from the start provided the on-scene briefing.
2016 Q1 Update: This procedure remains in effect for use in any lethal force event but was not set in motion this quarter as no such event occurred.
2016 Q2 Update: This process was implemented in the May 2016 OIS. One of the officers and his attorney participated in a scene walk through with Detectives.
2016 Q3 Update: This procedure remains in effect for use in any lethal force event but was not set in motion this quarter as no such event occurred.
2016 Q4 Update: This process was followed in the December 2016 officer-involved shooting. One of the witness officers participated in a scene walk through with Detectives.
2017 Q1 Update: This procedure was followed in both officer-involved shootings that occurred on February 9, 2017:
   In the first OIS case involving Mr. Hayes, Detectives asked one of the witness officers to provide a briefing to the investigative team and conduct a scene walkthrough and the officer agreed to do so.
   In the second OIS involving Mr. Perkins, a witness officer briefed the investigative team and participated in a walk-through of the scene with Detectives.
2017 Q2 Update: This procedure was followed in the May, 10, 2017 officer-involved shooting. One of the witness officers participated in a scene walk through with Detectives.
2017 Q3 Update: This procedure was followed in the August 30, 2017 officer-involved shooting. One of the witness officers participated in a scene walk through with Detectives.
2017 Q4 Update: This procedure was followed in the October 25, 2017 officer-involved shooting. One of the witness officers provided an on-scene walk through with Detectives.
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2018 Q1 Update: This procedure was followed in the March 8, 2018 officer-involved shooting. One of the witness officers provided an on-scene walk through with Detectives.

2018 Q2 Update: This procedure was followed in the April 8, 2018 officer-involved shooting. One of the Sergeants who was a witness provided an on-scene walk through with Detectives.

2018 Q3 Update: This procedure was followed at the September 30, 2018 officer-involved shooting. One of the officers who was a witness provided an on-scene walk through at the request of a Detective.

2018 Q4 Update: This procedure was followed at three of the officer-involved shootings. One of the officers who was a witness provided an on-scene walk through at the request of a Detective in each of those cases.

2019 Q1 Update: This procedure was followed at the two officer-involved shootings. One of the officers who was a witness provided an on-scene walk through at the request of a Detective in each of those cases.

2019 Q2 Update: This procedure was followed at the officer-involved shooting on April 29, 2019. One of the officers who was a witness provided an on-scene walk through at the request of a Detective.

2019 Q3 Update: This procedure was followed at the officer-involved shooting on July 30, 2019. One of the officers who was a witness provided an on-scene walk through at the request of Detectives.

2019 Q4 Update: This procedure was followed at the officer-involved shooting on December 8, 2019. The lead detective asked one of the witness officers to provide an on-scene walk through as well as a recorded statement. The officer responded yes to both.

2020 Q1 Update: There was no OIS this quarter so no need to utilize this protocol.

2020 Q2 Update: This procedure was followed at the officer-involved shooting that occurred on June 28, 2020. One of the detectives asked one of the witness officers to provide an on-scene walk-through as well as a recorded statement. The officer agreed to both requests.

2020 Q3 Update: There was no OIS this quarter so no need to utilize this protocol.

2020 Q4 Update: This procedure was followed at the officer-involved shooting that occurred on December 24, 2020. One of the detectives asked a witness officer to provide an on-scene walk-through as well as a recorded statement. The officer agreed to both requests.

2021 Q1 Update: There was no OIS this quarter so no need to utilize this protocol.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
**Task Description**: Involved officer on-scene walk-throughs

**Task Requirements**: In agreement and collaboration with the Multnomah County District Attorney, PPB shall request that involved officers in lethal force and in-custody death events provide a voluntary, on-scene walk-through and interview, unless the officer is incapacitated.

**Status**: Actively in Process

**Action Steps**:
1. PPB will change the policy associated with on scene review of an incident
2. Detectives Division will ensure changes to internal SOPs regarding detective interviews on scene
3. PPB will submit changes to Directive and SOP to DOJ for approval
4. PPB will alert community, stakeholders, and PPB employees of change and allow for comment
5. PPB will incorporate feedback and finalize policy within 45 days of DOJ approval

**Task Date Completed**: 
- **2014 Q1 Update**: SOP in place. Unable to do in lethal force incident in March near Wilson High as officer was shot and taken to hospital.
- **2014 Q2 Update**: This continues to be the practice of the PPB.
- **2014 Q3 Update**: This process was followed in the investigation of the I-84 incident that resulted in the shooting of a young man on Labor Day.
- **2014 Q4 Update**: This remains the practice of the PPB in lethal force and in-custody death cases.
- **2015 Q1 Update**: It remains the practice of PPB to ask for a voluntary on-scene walk through in lethal force events. There was one lethal incident this quarter. The officer was asked to participate in an on-scene walk-through but declined. This protocol will also be addressed at the stakeholders meeting referenced in Action item #124.
- **2015 Q2 Update**: This is the protocol in place for lethal force events. There were two such events this quarter and in both cases, the officers were asked but declined to participate in an on-scene briefing or public safety statement.
- **2015 Q3 Update**: This protocol remains in effect for lethal force events. In the lethal force incident that took place in July, the officers were asked by detectives both to participate in a voluntary on-scene walk through and to provide a voluntary statement. Neither occurred as the officer declined based on the advice of his counsel.
- **2015 Q4 Update**: This protocol remains in place for lethal force events. In the one incident this quarter that occurred on November 6, 2015, the two officers were asked to participate in a voluntary on-scene walk-through and provide a voluntary statement. Both officers declined the requests based on the advice of counsel.
- **2016 Q1 Update**: It remains the protocol of PPB to ask for a voluntary on-scene walk through in lethal force events. However, there were no such events this quarter.
- **2016 Q2 Update**: This protocol remains in effect for lethal force events. In the OIS that occurred on May 24, 2016, the two involved officers were asked by Detectives to participate in a voluntary on-scene briefing and interview and both declined at the time.
- **2016 Q3 Update**: This protocol remains in effect for lethal force events. However, there were no such events this quarter.
- **2016 Q4 Update**: This protocol remains in effect for lethal force events. In the OIS that occurred on December 6, 2016, the involved officer was asked by Detectives to participate in a voluntary on-scene briefing and interview but declined at the time.
- **2017 Q1 Update**: The protocol remained in effect for lethal force events.

In the first OIS on February 9, 2017 that involved Quanice Hayes, the Detective asked Officer Hearst if he would be willing to conduct an on-scene briefing to which he replied no. Officer Hearst was then asked if he would be willing to provide an interview at the time and he again replied no.
In the second OIS of that day, the same response by the involved officer was received to both questions.

2017 Q2 Update: This protocol remains in effect for lethal force incidents. In the OIS that occurred on May 10, 2017, the Detective asked the involved officer if he was willing to participate in an on-scene briefing and if he would interview with Detectives. The officer replied "not right now" to both questions.

2017 Q3 Update: This protocol remains in effect for lethal force incidents. In the OIS that occurred on August 30, 2017, the lead Detective asked the involved officer if he were willing to provide a voluntary statement and the officer replied "no." The Detective also asked if he would participate in an on-scene briefing and conduct a walk-through. The officer again replied "no" to both requests.

2017 Q4 Update: This protocol remains in effect for lethal force incidents. In the OIS that occurred on October 25, 2017, the Detective asked the involved officer to provide an on-scene statement. The officer declined to do so.

2018 Q1 Update: This procedure was followed in the March 8, 2018 officer-involved shooting. In the OIS that occurred on March 8, 2018, the Detective asked the involved officers to provide an on-scene statement. Both officers declined to do so.

2018 Q2 Update: This procedure was followed in the April 8, 2018 officer-involved shooting. In the OIS that occurred on April 8, 2018, the Detective asked the involved officers to provide an on-scene statement/interview. All seven PPB officers and one Multnomah County Deputy declined to do so.

2018 Q3 Update: This protocol remains in effect for lethal force incidents. It was followed in the September 30, 2018 officer-involved shooting. The Detective asked both the involved officers to provide an on-scene statement. Both members declined to do so.

2018 Q4 Update: This protocol remains in effect for lethal force incidents. It was followed in all four of the officer-involved shootings this quarter. In each case, Detectives asked the involved officer(s) to provide an on-scene walk-through and statement and in each case, the officer(s) declined to do so based on advice of counsel.

2019 Q1 Update: This protocol remains in effect for lethal force incidents. It was followed in the two officer-involved shootings this quarter. In each case, Detectives asked the involved officer to provide an on-scene walk-through and statement. In one case the officer declined on the advice of counsel and in the other, the officer invoked his 5th and 6th Amendment rights.

2019 Q2 Update: This protocol remains in effect for lethal force incidents. It was followed in the April officer-involved shooting. In this case, the Detective asked the involved officers to each provide an on-scene walk-through and statement. The officers declined based on advice of counsel.

2019 Q3 Update: This protocol remains in effect for lethal force incidents. It was followed in the July officer-involved shooting. In this case, the Detective asked the officer to provide an on-scene walk-through and statement. The officer's attorney provided a written statement on behalf of his client indicating the invocation of the officer's right to remain silent.

2019 Q4 Update: This protocol remains in effect for lethal force incidents. It was followed in the December officer-involved shooting. In this case, the Detective asked the involved officer to provide an on-scene walk through and a recorded statement. With his attorney present, the officer respectfully declined both and invoked his constitutional rights under both the state and federal constitutions.

2020 Q1 Update: This protocol remains in effect for lethal force incidents. However, there was no OIS this quarter.

2020 Q2 Update: This protocol remains in effect for lethal force incidents. It was followed in the June 28th officer-involved shooting. In this case, the Detective asked the involved officer to provide an on-scene walk through and a recorded statement. The officer's attorney responded and declined both requests on behalf of her client.

2020 Q3 Update: This protocol remains in effect for lethal force incidents. However, there was no OIS this quarter.

2020 Q4 Update: This protocol remains in effect for lethal force incidents. It was followed in the December 24, 2020 officer-involved shooting despite the fact that the involved officer was injured and was hospitalized. The Detective went to the hospital and asked if the officer was willing to conduct an on-scene briefing despite her current location.
The detective further asked if she would be willing to be interviewed at that time. The officer respectfully declined, invoking her constitutional rights.

2021 Q1 Update: This protocol remains in effect for lethal force incidents. However, there was no OIS this quarter.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Task Description

IPR and IA Interview Plan Implementation

Task Requirements: The City will develop and implement a plan to reduce time and effort consumed in the redundant interview of witnesses by both IPR and IA, and enable meaningful independent investigation by IPR, when IPR determines such independent investigation is necessary.

Status Actively in Process

Action Steps:
1. IPR and IA will hire additional investigators
2. IPR will consult with IA to pursue City Code changes that allows for IPR to conduct meaningful independent investigations

Task Date Completed: Received DOJ Approval? Approval

Evidence of Completion:
1. Draft City Code Chapter 3.21, Section 3.21.070 P
2. Personnel orders identifying new Internal Affairs investigator positions

Status Note:
2014 Q1 Update: Additional investigators are working cases. IA and IPR jointly working cases in collaborative fashion. Pertinent City Code changes are found in Chapter 3.21.120 B 3 a & b; C 2 a & b; and Chapter 3.21.220 A, B, C & D

2014 Q2 Update: IPR is conducting more in-depth intake interviews and has done several more independent investigations.

2014 Q3 Update: IA and IPR continue to work collaboratively on administrative investigations to reduce redundant interviews.

2014 Q4 Update: IA and IPR work closely together on administrative investigations to avoid redundant interviews when possible.

2015 Q1 Update: This plan is in effect. It is being worked now. IPR is doing more thorough intake interviews which has helped to alleviate the need for multiple interviews.

2015 Q2 Update: IPR has made efforts to streamline its intake process and refrain from extensive investigation on cases that are going to be full IA investigations so that redundancy is avoided. IA gets the case after IPR has done its intake, and has to do what is necessary to complete a thorough investigation. If IPR has already interviewed witnesses or the complainant completely, IA does not re-contact them unless critical reason exists.

2015 Q3 Update: IA and IPR continue to use the process in place to work collaboratively on these investigations to avoid the need for redundant interviews.

2015 Q4 Update: IA and IPR maintained their practice of coordinating their efforts to avoid redundant interviews.

2016 Q1 Update: IA and IPR maintained their practice of coordinating their efforts to avoid redundant interviews.

2016 Q2 Update: IPR has made efforts to streamline its intake investigations specifically to refrain from extensive investigations with allegations known to require a full IA investigation such as force complaints. When IA receives these cases, it conducts the extensive interviews necessary for the case. With regard to cases in which IPR has conducted an extensive intake interview, IA uses that information for its investigation and does not repeat the interview unless necessary information is missing.

2016 Q3 Update: IPR has made efforts to streamline its intake investigations specifically to refrain from extensive investigations with allegations known to require a full IA investigation such as force complaints. When IA receives these cases, they complete the extensive interviews necessary for the case. With cases where IPR has conducted an extensive intake interview, IA uses that information for their investigation and does not repeat the interview unless necessary information is missing.

2016 Q4 Update: The efforts previously made in this regard, as noted in prior quarters, have been maintained this quarter.

2017 Q1 Update: The efforts previously made in this regard, as noted in prior quarters, have been maintained during this time frame.

2017 Q2 Update: The efforts previously made in this regard, as noted in prior quarters, have been maintained during this time frame.

2017 Q3 Update: The joint efforts of IPR and IA to coordinate their investigations has continued during this quarter.

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The collaborative efforts of IPR and IA to coordinate their investigations has continued this quarter.

The joint efforts previously made in this regard, as noted in prior quarters, have been maintained during this time frame.

The collaborative venture previously undertaken in this arena has continued during this quarter.

The collaborative efforts previously made in this regard have continued during this quarter.

Collaboration between IA and IPR took to new heights this quarter. IPR named a new interim Director whose background is in data analysis so she engaged in a comprehensive review of the administrative process to identify areas where time savings could be achieved.

As a result, IPR has made efforts to streamline its intake investigations, specifically to refrain from extensive investigations with allegations known to require a full IA investigation such as force complaints. When IA receives these cases, they complete the extensive interviews necessary for the case. With cases where IPR has conducted an extensive intake interview, IA uses that information for their investigation and does not repeat the interview unless necessary information is missing.

IPR has made efforts to streamline its intake investigations, specifically to refrain from extensive investigations with allegations known to require a full IA investigation, such as force complaints. When IA receives these cases, they complete the extensive interviews necessary for the case. With cases where IPR has conducted an extensive intake interview, IA uses that information for their investigation and does not repeat the interview unless necessary information is missing.

The collaborative efforts previously made in this regard have continued during this quarter.

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The collaborative efforts previously made in this regard have continued during this quarter.
Use of excessive force investigations

**Task Requirements:** The City and PPB shall ensure that all allegations of use of excessive force are subject to full and completed IA investigations resulting in findings, unless there is clear and convincing evidence to IPR that the allegation has no basis in fact.

**Status:** Actively in Process

**Action Steps:**
1. IPR propose changes to City Code to ensure that this is codified policy

**Task Date Completed:**

**Evidence of Completion:**
1. Proposed changes to City Code 3.21.110 A (located in folder #128)
2. PSD SOP #19

**Status Note:**

**2014 Q1 Update:** Relevant City Code provisions were enacted in December, 2013.

**2014 Q2 Update:** New SOP written to take effect July 1, 2014.

**2014 Q3 Update:** PPB/IA continues to abide by this requirement re: allegations of the use of excessive force.

**2014 Q4 Update:** PPB continues to conduct full and complete IA investigations on all allegations of use of excessive force that IPR forwards to the Bureau.

**2015 Q1 Update:** PPB conducts full and complete IA investigations on all allegations of use of excessive force as IPR forwards all of them now.

**2015 Q2 Update:** PPB’s IA continues to investigate all allegations of use of excessive force. IA will make a minor edit to its SOP to memorialize this change required by DOJ.

**2015 Q3 Update:** PPB’s IA continues to conduct full investigations on all allegations of use of excessive force as it has since December 2014. The relevant SOP has been revised and is in effect.

**2015 Q4 Update:** PPB’s IA is following its SOP which requires that all allegations of excessive use of force be fully investigated, resulting in findings.

**2016 Q1 Update:** PPB’s IA is following its SOP which requires that all allegations of excessive use of force be fully investigated, resulting in findings. The relevant SOP states: “Cases with any excessive use of force allegations will also be assigned as complete IA investigations resulting in findings, unless there is clear and convincing evidence to IPR that the allegation has no basis in fact.”

As of March 31, 2016, there were thirty-one (31) allegations of force opened as new cases initiated in the first quarter. Of those, one case was declined. In that case, IA Case 2016-C-0048, the matter was fully investigated; however, during the IA intake stage, one of the officers named was determined to have had NO physical contact with the complainant and was removed as a subject in that investigation.

**2016 Q2 Update:** As of July 9, 2016, there were 13 cases with force allegations initiated in the second quarter of 2016. Of those, none were declined by IA.

**2016 Q3 Update:** As of October 20, 2016, there were 16 cases with force allegations initiated in the 3rd Quarter of 2016. Of those, none were declined by IA.

These numbers may be subject to change as cases initiated in later part of quarter progress in the intake process.

**2016 Q4 Update:** As of January 19, 2017, there were 16 cases with force allegations initiated in the fourth quarter by either IA or IPR. Of those, none were declined by IA. These numbers may be subject to change as cases initiated in the later part of the quarter progress in the intake process. Fifteen of these cases are currently being investigated by IA or IPR. One case, 2016-C-033, is closed.

As of January 19, 2017, there were 11 cases with force allegations closed in the fourth quarter. Of those, none were declined by IA.

**2017 Q1 Update:** As of April 21, 2017, there were 14 cases with force allegations reported in the 1st Quarter of 2017. Of those, none were declined
by IA. These numbers may be subject to change as cases initiated in later part of quarter progress in the intake process. Twelve of these cases are currently being or have been investigated by IA or IPR. The other two of the fourteen were declined by IPR and thus not referred to IA.

As of April 21, 2017, there were 31 cases with force allegations closed in the 1st Quarter of 2017. Of those, none were declined by IA.

**2017 Q2 Update:** Thus far, there were 17 cases opened Q2 that were found to have force related allegations. Of those cases, eleven are currently in the investigative process and two cases have had findings or are in the findings process. Furthermore, two of the 17 cases are currently being investigated by IPR and one was declined IPR. One case was withdrawn by the complainant.

**2017 Q3 Update:** PPB continues to follow its SOP 19 and DOJ's direction to fully investigate all allegations of excessive force. As of October 20, 2017, there were twelve cases with at least one force allegation reported in this quarter. Of those, none were declined by IA. One case was dismissed by IPR as they were unable to identify the involved member. These numbers may be subject to change as cases initiated in the later part of the quarter progress in the intake process. Seven of these cases are currently being or have been investigated by IA or IPR. One of these cases remains in the intake process at IPR and one case is pending RU findings. As of the same date, there were eleven cases with force allegations closed by IA in the 3rd quarter. Of those, none had force allegations declined by IA. During the same time period, IPR closed at least three cases that had dismissed force allegations.

**2017 Q4 Update:** As of 1/17/18, there were ten cases with at least one force allegation reported in the 4th quarter of 2017. Of those, none were declined by IA. One of these cases (2017-C-0310) was dismissed by IPR as it appears there was clear and convincing evidence the complainant was untruthful in his claims about improper handcuffing. Another case (2017-C-0345) has declined force allegations, but other force allegations in the same incident are currently being investigated by IPR.

These numbers may be subject to change as cases initiated in the later part of the quarter progress in the intake process. Including 2017-C-0345, nine of these cases are currently being or have been investigated by IA or IPR. One case is pending PRB findings, and two cases are pending RU findings.

**2018 Q1 Update:** As of 4/20/18, there were 21 cases with at least one force allegation reported in this quarter. Of those, none were declined by IA. One of these cases (2018-C-0020) was dismissed by IPR because the force “allegation” was added erroneously; no complaint of force was made. Another case (2018-C-0034) was declined by IPR as the complaint was actually about force used by an MCSO deputy at the jail. A third case, (2018-C-0051) was dismissed by IPR as they were unable to speak with the complainant. The fourth case (2018-C-0086) was dismissed by IPR as they were unable to identify an involved officer. Finally, another case (2018-C-0038) was dismissed by IPR after it determined that while the complainant had indeed been handcuffed, no force or pain compliance had been used. Additionally, the complainant made no complaint of pain.

These numbers may be subject to change as cases initiated in the later part of the quarter progress in the intake process.

Sixteen of these cases are currently being or have been investigated by IA or IPR, and one of the sixteen has already been through findings and closed.

**2018 Q2 Update:** As of 7/14/18, there were 15 cases with at least one force allegation reported in the 2nd quarter. Of those, none were declined by IA. One of these cases (2018-C-0170) was administratively closed by IPR as the complaint involved an Oregon State Trooper. Another case (2018-C-0193) was dismissed by IPR as they were unable to identify the officer.

It should be noted that these numbers may be subject to change as cases initiated in later part of quarter progress in the intake process.

Thirteen (13) of these cases are currently being or have been investigated by IA or IPR.
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**2018 Q3 Update:** As of October 3, 2018, there were 20 cases with at least one force allegation reported in the 3rd Quarter. Of those, one was administratively closed by IA due to the inability to identify an involved member. Additionally, of the 20 cases, eight were administratively closed by IPR. One of those cases, (2018-C-0259), was closed by IPR because the complaint involved officers employed by the Port of Portland. Another case, (2018-C-0265), was dismissed by IPR because the complainant was unable to provide sufficient information to continue its investigation. The remaining cases stemmed from a protest on August 4, 2018 where IPR was unable to identify complainants or involved members.

Finally, ten of the cases are under active investigation by IA and IPR and one is pending the creation of an allegation. It should be noted that these numbers may be subject to change as cases initiated in later part of quarter progress in the intake process.

**2018 Q4 Update:** As of 12/31/18, there were 13 cases with at least one force allegation reported in the 4th quarter. Of those, one case (2018-C-0335) was administratively closed by IPR due to the inability to identify an involved member. Another one of these cases (2018-C-0326) was administratively closed by IPR as the complainant was unavailable. Two cases (2018-C-0334, 2018-C-0383) were dismissed by IPR because of jurisdictional issues.

Finally, nine of the cases are under active investigation by IA or IPR.

**2019 Q1 Update:** As of 3/31/19, there were 14 cases with at least one force allegation reported in the 1st Quarter of 2019.

Two of the cases were administratively closed by IPR. Of those, one case (2019-C-0018) was administratively closed by IPR due to the inability to identify an involved member. The other case (2019-C-0028) was administratively closed by IPR as the complainant was unavailable.

Of the remaining twelve, 11 of the cases are under active investigation by IA and one case is under active investigation by IPR.

**2019 Q2 Update:** As of 07/22/19, there were 10 cases with at least one force allegation initiated in the 2nd Quarter of 2019. None of the cases has been administratively closed. Nine of these cases are currently being or have been investigated by IA or IPR. The remaining case was in the intake process.

**2019 Q3 Update:** As of 10/22/19, there were 23 cases with at least one force allegation initiated in the third quarter. Of these, six were administratively closed by IPR (2019-C-0264, 2019-C-0276, 2019-C-0288, 2019-C-0292, 2019-C-0309 and 2019-C-0311) and one is under investigation by IPR. The remainder are under investigation at Internal Affairs or at one of the various review stages.

**2019 Q4 Update:** There were 12 cases with at least one force allegation initiated in the 4th quarter. Of these, two were administratively closed by IPR (2019-C-0311 and 2019-C-0319). The remainder are under investigation at Internal Affairs or at one of the various review stages.

**2020 Q1 Update:** There were 17 cases with at least one force allegation initiated in the 1st Quarter of 2020. Of these cases, 3 were administratively closed by IPR (2020-C-0016, 2020-C-0041 and 2020-C-0062). The remainder are under investigation in Internal Affairs or at one of the various review stages.

**2020 Q2 Update:** Twenty-three cases with at least one force allocation were initiated in the 2nd Quarter. One case was administratively closed by IPR and the remainder are at intake, under investigation, or at one of the various review stages.

**2020 Q3 Update:** There were 20 cases with at least one force allocation initiated in the 3rd Quarter. Of these cases, none were administratively closed by IPR.

**2020 Q4 Update:** As of January 13, 2021, there were 18 cases with at least one force allocation initiated in the 4th Quarter. None of the cases have been administratively closed and all cases are at various stages of investigation or review.

**2021 Q1 Update:** As of April 14, 2021, there were 10 cases with at least one force allocation initiated in the 1st Quarter. None of the cases have been administratively closed and all cases are at various stages of investigation or review.

**2021 Q2 Update:**

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2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

Friday, May 7, 2021
Task Description
Prohibition of retaliation against those who report misconduct

Task Requirements: The City and PPB shall continue to expressly prohibit all forms of retaliation, including discouragement, intimidation, coercion, or adverse action, against any person who reports misconduct, makes a misconduct complaint, or cooperates with an investigation of misconduct.

Status  Complete - pending external review

Action Steps:  1. Ensure that PPB policies adhere to the requirements of this provision.

Task Date Completed:  12/14/2012  Received DOJ Approval?  Approval

Evidence of Completion:  1. Directive 310.120  2. City of Portland HR Policy 2.02

Status Note:
2014 Q1 Update:

2014 Q2 Update: City Attorney's office is reviewing the old Directive 310.20 with new comments received after its posting to reconcile and finalize the proposal for Chief's consideration.

2014 Q3 Update: Retaliation Directive 310.20 is in Executive reconciliation stage.

2014 Q4 Update: Directive 310.20 prohibiting retaliation was enacted on November 19, 2014.

2015 Q1 Update: The relevant directive 310.20 is in effect.

2015 Q2 Update: Directive 310.20 was posted for universal public comment on May 2, 2015 for its required 6 month review. It is currently in the Executive Reconciliation phase.

2015 Q3 Update: Directive 310.20 was enacted this quarter. DOJ indicated that it generally meets the prohibition requirements of this paragraph. However, DOJ recently suggested that the City failed to address issues of allegations of intimidation. That incident involved an individual acting in a capacity separate and apart from duties as an officer, so PPB has no role in pursuing that case. DOJ should determine the outcome and correct the prior assertion.

2015 Q4 Update: Directive 310.20 is in effect and is not scheduled to be reviewed again until July 2016.

2016 Q1 Update: Directive 310.20 is in effect and is not scheduled to be reviewed again until July 2016.

2016 Q2 Update: Directive 310.20 is in effect and is not scheduled to be reviewed until July 2016.

2016 Q3 Update: Directive 310.20 remains in effect and is on the list for review under the new Directives process.

2016 Q4 Update: Directive 310.20 remains in effect and is on the list for review with the rest of the 300 series in the near future after the force suite of directives is complete.

2017 Q1 Update: Directive 310.20 remains in effect but is on the list for review with the rest of the 300 series in the near future after the force suite of directives is complete.

2017 Q2 Update: Directive 310.20 remains in effect but is on the list for review with the rest of the 300 series re: Accountability that is now being addressed.

2017 Q3 Update: The directive prohibiting retaliation, 310.20, transitioned from Universal Review to Executive Reconciliation during this quarter.

2017 Q4 Update: The directive prohibiting retaliation, 310.20, remained in Executive Reconciliation status this quarter, awaiting DOJ approval.

2018 Q1 Update: Directive 310.20 received DOJ approval and was enacted this quarter.

2018 Q2 Update: Directive 310.20 remains in effect.

2018 Q3 Update: Directive 310.20 was due for its six month review so was posted for First Universal Review from 9/1/18-9/15/18.
<table>
<thead>
<tr>
<th>Year</th>
<th>Update</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>Q4 Update</td>
<td>Directive 310.20 is now in the Executive Reconciliation phase of the policy process.</td>
</tr>
<tr>
<td>2019</td>
<td>Q1 Update</td>
<td>Directive 310.20 transitioned from the Executive Reconciliation phase of the policy process to 2nd Universal Review status and is now pending DOJ review.</td>
</tr>
<tr>
<td>2019</td>
<td>Q2 Update</td>
<td>Directive 310.20 was returned from DOJ but it is part of a suite of accountability directives that are currently under review by PPA. Once all directives in the suite have been resolved and re-reviewed by DOJ, this directive will move to enactment.</td>
</tr>
<tr>
<td>2019</td>
<td>Q3 Update</td>
<td>Directive 310.20 remained under Executive Reconciliation this quarter as negotiations with the PPA continued on the accountability suite of directives.</td>
</tr>
<tr>
<td>2019</td>
<td>Q4 Update</td>
<td>The Bureau has completed the review and executive reconciliation process for Directive 310.20 but it continues to await DOJ approval.</td>
</tr>
<tr>
<td>2020</td>
<td>Q1 Update</td>
<td>Directive 310.20 was approved by DOJ and will now move to the next step in the process to be enacted.</td>
</tr>
<tr>
<td>2020</td>
<td>Q2 Update</td>
<td>Directive 310.20 was enacted on May 15, 2020.</td>
</tr>
<tr>
<td>2020</td>
<td>Q3 Update</td>
<td>Directive 310.20 remains in effect without change this quarter.</td>
</tr>
<tr>
<td>2020</td>
<td>Q4 Update</td>
<td>Directive 310.20 remains in effect without change this quarter.</td>
</tr>
<tr>
<td>2021</td>
<td>Q1 Update</td>
<td>Directive 310.20 remains in effect without change this quarter.</td>
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<td>2021</td>
<td>Q2 Update</td>
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</tr>
<tr>
<td>2022</td>
<td>Q4 Update</td>
<td></td>
</tr>
</tbody>
</table>

Friday, May 7, 2021
Department of Justice Tasks / Quarterly Update Report

Task Description
CRC Participation and Rotation on PRB

Task Requirements: The City and PPB shall retain Police Review Board procedures currently utilized for the purposes of investigation and making recommended findings on administrative complaints.

See specific requirements and considerations noted in the Agreement, #131.

Status: Actively in Process

Action Steps: 1. IPR will propose changes to City Code that modify PRB membership opportunities for CRC members.

Task Date Completed:  

Evidence of Completion: 1. Proposed changes to City Code 3.21 (located in folder #128)

Status Note:

2014 Q1 Update:

2014 Q2 Update: PSD drafted a revision of Directive 336.00 which was posted for public comment which was received. Forwarded to City Attorney's office for review and reconciliation.

2014 Q3 Update: After considerable review and discussion of the version posted in May, PPB re-posted Directive 336.00 for public comment on September 1, 2014. It is now in Executive reconciliation phase.

2014 Q4 Update: Directive 336.00 was enacted on October 30, 2014.

2015 Q1 Update: This particular directive is set for its six month review and will be posted for universal review on April 1, 2015.

2015 Q2 Update: The directive was posted for universal review as scheduled on April 1, 2015. It is now in the Executive Reconciliation phase.

2015 Q3 Update: This directive remained in Executive Reconciliation phase during this quarter.

2015 Q4 Update: This directive is still in the Executive Reconciliation phase. It will be finalized with the rest of the 300 series Directives once the review of the overall Accountability system is completed in the Spring and DOJ has provided its feedback.

2016 Q1 Update: The status of this directive remains the same as last quarter.

2016 Q2 Update: The status of this directive remains the same as in the last quarter. The changes to the accountability system under consideration currently would require revision of this directive as the new proposal would have different designated participants in the process. A meeting has been set for the last week of July to begin work on changes to the discipline directives that would mirror the suggestions given to City Council on July 1, 2016.

2016 Q3 Update: The status of this directive remains the same. The stakeholder group requested by the City Council will begin meeting in the 4th quarter to look at further recommendations for the accountability system. This may ultimately impact changes to the directive.

2016 Q4 Update: The status of this directive remains the same. The current practice mirrors the settlement agreement but the directive awaits review when the 300 series is addressed after the use of force directives are completed. Also there are potential City code changes being considered that may affect this directive.

2017 Q1 Update: The status of this directive remains the same. The current practice mirrors this item in the settlement agreement, but the directive has not been fully updated. The use of force directives have been the priority this quarter. Further, there are potential code changes coming that may affect this directive.

2017 Q2 Update: The status of this directive remains the same as in previous quarters. This directive, as well as the others in the accountability "suite" of policies, is scheduled to be addressed during the next quarter as the parties have completed the suite of force policies.

2017 Q3 Update: The accountability directives, including this one, have been drafted and reviewed with DOJ in policy meetings and are now awaiting DOJ's final approval process.

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The current practice re: CRC and rotation on PRB and the proposed policy mirror the requirements of this item but PPB has not yet received the approval letter for Directive 336.00.

2017 Q4 Update: The accountability directives have been drafted and are going through the final approval process. During this time, the current practice mirrored the requirement in this paragraph of the Settlement Agreement but the directive has not received final approval by DOJ as yet.

2018 Q1 Update: The accountability directives, approved by DOJ and the COCL, were enacted right at the end of the quarter. Training for the new directives is ongoing, and they will be fully implemented at the end of Quarter 2.

2018 Q2 Update: Training for the new directives is just about complete as Spring In-service comes to a close in early August.

2018 Q3 Update: The accountability directives, approved by DOJ and the COCL, were enacted at the end of the 1st quarter. Training for the new directives has concluded. They were fully implemented on July 1, 2018.

2018 Q4 Update: The accountability suite of directives remain in effect as approved.

2019 Q1 Update: The accountability suite of directives remain in effect as approved.

2019 Q2 Update: The accountability suite of directives remain in effect as approved.

2019 Q3 Update: The accountability suite of directives as approved remains in effect while they undergo review of proposed changes and negotiation of bargaining rights issues.

2019 Q4 Update: The accountability suite of directives as approved remains in effect while proposed revisions undergo review and approval of DOJ.

2020 Q1 Update: The accountability suite of directives with the proposed revisions were finally approved by DOJ and were posted in LMS for members' review and signature on a staggered basis due to the number of directives to be enacted.

2020 Q2 Update: The entire suite of accountability directives were enacted this quarter.

2020 Q3 Update: The accountability suite of directives remain in effect as approved.

2020 Q4 Update: The accountability suite of directives remain in effect as approved.

2021 Q1 Update: The accountability suite of directives remain in effect as approved.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Requests made by PRB for additional investigation

**Task Requirements:** By majority vote, the PRB may request that investigations of misconduct be returned to its investigating entity, i.e. PSD or IPR, to complete the investigation as to factual matters necessary to reach a finding regarding alleged misconduct. The investigating entity must make reasonable attempts to conduct the additional investigation or obtain the additional information within 10 business days or provide a written statement to the PRB explaining why additional time is needed.

**Status:** Actively in Process

**Action Steps:**
1. Modify Directive 336.00 Police Review Board to incorporate requirements of this provision
2. Notify PRB participants of change in procedure, outlined in Division SOP

**Task Date Completed:**

**Evidence of Completion:**
1. New Draft Directive 336.00
2. Action Taken email from PSD

**Status Note:**

**2014 Q1 Update:** This outlined process now incorporated in City Code 3.20.140

**2014 Q2 Update:**

**2014 Q3 Update:** Police Review Board Directive 336.00 was re-posted for public comment and Universal review on September 1, 2014. After the requisite 30 days, it is now in Executive Reconciliation phase.

**2014 Q4 Update:** Directive 336.00 was enacted on October 30, 2014. This incorporates the requirement in this action item that PPB perform additional investigation, if requested by PRB, and PPB does so on the rare occasions this arises.

**2015 Q1 Update:** As noted, this requirement was incorporated into Directive 336.00 and is done when requested.

**2015 Q2 Update:** This process is followed upon request of PRB.

**2015 Q3 Update:** To date, PPB has not had a case returned by the PRB for additional investigation. However, to assure that individuals are aware of this option, community members and peer members are instructed about this perogative when they review the file in advance of a PRB hearing. Further, as a matter of practice, the PRB facilitator reads a script that includes the language "The Police Review Board may also make recommendations to the Chief of Police regarding the adequacy and completeness of an investigation." Recently that language in the Facilitator's script has been enhanced to specifically state "By majority vote, the PRB may request that investigations of misconduct be returned to its investigating entity, i.e. PSD or IPR, to complete the investigation as to factual matters necessary to reach a finding regarding the alleged misconduct."

**2015 Q4 Update:** There were no cases returned by the PRB for additional investigation in this quarter.

**2016 Q1 Update:** There were no investigations returned by the PRB for additional investigation in this quarter.

**2016 Q2 Update:** In the second quarter, there were no investigations returned by the PRB for additional investigation.

**2016 Q3 Update:** There were no investigations returned by the PRB for additional investigation in the 3rd Quarter of 2016.

**2016 Q4 Update:** In the fourth quarter, there were no investigations returned by the PRB for additional investigation.

**2017 Q1 Update:** There were no investigations returned by the PRB for further investigation in the first quarter.

**2017 Q2 Update:** There were no investigations returned by the PRB for further investigation in this quarter.

**2017 Q3 Update:** There were no investigations returned by the PRB for additional investigation in the 3rd quarter of 2017.

**2017 Q4 Update:** There were no investigations returned by the PRB for additional investigation in the 4th quarter of 2017.

**2018 Q1 Update:** There were no investigations returned by the PRB for additional investigation in this quarter.

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2018 Q2 Update: There were no investigations returned by the PRB for additional investigation in the 2nd quarter of 2018.

2018 Q3 Update: There were no investigations returned by the PRB for additional investigation in the third quarter.

2018 Q4 Update: There were no investigations returned by the PRB for additional investigation in the 4th Quarter of 2018.

2019 Q1 Update: There were no investigations returned by the PRB for additional investigation in the first quarter of 2019.

2019 Q2 Update: There were no investigations returned by the PRB for additional investigation in the second quarter of 2019.

2019 Q3 Update: There were no investigations returned by the PRB for additional investigation in the third quarter of 2019.

2019 Q4 Update: There were no investigations returned by the PRB for additional investigation in the fourth quarter of 2019.

2020 Q1 Update: There were no investigations returned by the PRB for additional investigation in the first quarter of 2020.

2020 Q2 Update: There were no investigations returned by the PRB for additional investigation in this quarter.

2020 Q3 Update: There were no investigations returned by the PRB for additional investigation in this quarter.

2020 Q4 Update: There were no investigations returned by the PRB for additional investigation in this quarter.

2021 Q1 Update: There were no investigations returned by the PRB for additional investigation in the 1st Quarter.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
**Task Description**

Civil liability claims and follow-up IA investigations

**Task Requirements:**

If an officer's use of force gives rise to a finding of liability in a civil trial, PPB shall: (1) enter that civil liability finding in the EIS; (2) reevaluate the officer's fitness to participate in all current and prospective specialized units; (3) if no IA investigation has previously been conducted based upon the same allegation of misconduct and reached an administrative finding, conduct a full IA investigation with the civil trial finding creating a rebuttable presumption that the force used also violated PPB policy, which presumption can only be overcome by specific, credible evidence by a preponderance of evidence; (4) if an IA investigation has already concluded based upon the same allegation of misconduct and failed to reach a sustained finding, identify whether any new evidence exists in the record of the civil trial to justify the reopening of the IA investigation, and if so, reinitiate an IA investigation; and (5) if an IA investigation has already concluded based upon the same allegation of misconduct and failed to reach a sustained finding, and no new evidence from the civil trial justifies reopening the IA investigation, work with IPR to identify the reason why the administrative finding was contrary to the civil trial finding and publish a summary of the results of the inquiry.

**Status**
Complete - pending external review

**Action Steps:**

1. IA will add "review of findings of liability in lawsuits against PPB personnel" to scope of review for IA Lieutenant
2. IA will draft new SOP regarding Tort and Lawsuit Review processes
3. Tort Review Committee will continue to review all Tort Claims

**Task Date Completed:** 11/7/2013

**Evidence of Completion:**
1. Draft IA SOP #31
2. Tort Review Board example agenda
3. Definition of Tort Review Board
4. PPB Professional Standards Division SOP, page 2

**Status Note:**

- **2014 Q1 Update:** SOP #32 finalized and will take effect on July 1, 2014.

- **2014 Q2 Update:** This process was implicated by a jury verdict in September. PSD entered the finding in EIS and is in consultation with the City Attorney's office for advice on how to proceed with the other requirements of this action item including evaluation of fitness for current duties and what type of investigation to pursue at this point.

- **2014 Q3 Update:** This process was not initiated as no finding of civil liability was made by a jury this quarter. However, PSD continues its work related to the verdict rendered in September. It is crafting a draft SOP on how the evaluation of fitness will be conducted. The evaluations of the three officers involved in that case will be initiated in February. Discussions are on-going with USDOJ and the City Attorney's office regarding the investigation requirement that is outlined in the action item.

- **2014 Q4 Update:** No findings of civil liability related to the use of force were made against the Bureau in this quarter so no entries were made. The SOP re: evaluation of fitness is done and in place. The evaluation of the officer in the pending case has been completed and has been forwarded to the A/C for review.

- **2015 Q1 Update:** The Bureau sustained no findings of liability related to use of force in this quarter so no entries were made. PSD awaits further direction from City Attorney and DOJ re: the outstanding case in which this process was implicated.

- **2015 Q2 Update:** The Bureau sustained no findings of liability related to use of force in this quarter so no entries were made. The City and DOJ have clarified what is left to be done in the one case that is affected by this item. The final memo outlining a summary of the results of the inquiry is being drafted and will be forwarded to DOJ.

- **2015 Q3 Update:** The Bureau sustained no findings of liability related to use of force in this quarter, so no entries were made.

- **2015 Q4 Update:** The Bureau sustained no findings of liability related to use of force in this quarter so no entries were made.

- **2016 Q1 Update:** The Bureau sustained no findings of liability related to use of force in this quarter so no entries were made.

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**Friday, May 7, 2021**
Department of Justice Tasks / Quarterly Update Report

SOP 42 has been revised and reflects the recommendations made in the Technical Assistance report.

Regarding outstanding PPB Case No. 11-050814, IA has commenced a full administrative investigation into this incident. As soon as it is complete, it will be forwarded to DOJ.

2016 Q2 Update: PPB had no findings of liability related to the use of force in this quarter so no entries were made.  Regarding PPB Case No. 11-050814 (IA Case No. 2011-C-0237), IA has commenced a full administrative investigation into this incident. The investigator in charge of this case read over two thousand pages of documents, including all transcripts from the trial, depositions and reports written regarding this case. He then interviewed all of the officers involved. The report will be finished Monday July 11, 2016. The case will then proceed through the findings phase just like any other full investigation of force. Paragraph 133(4) or (5) will be followed once the case is complete and the finding has been finished.

2016 Q3 Update: The Bureau sustained no findings of liability related to use of force in this quarter so no entries were made. SOP 42 has been revised and reflects the recommendations made in the Technical Assistance report. Regarding PPB Case No. 11-050814 (IA Case No. 2011-C-0237), the report was finished July 19, 2016. During their review and approval process, IPR requested additional investigation on two separate occasions (August 3, 2016 and September 1, 2016). The investigation was finally completed on September 27, 2016 and East Precinct command staff wrote findings during this quarter. A Police Review Board (PRB) was held in this case on December 1, 2016 and a finding of sustained on the force allegation was recommended to the Chief. Paragraph 133(4) or (5) will be followed once the case is complete and the finding has been finished.

2016 Q4 Update: The Bureau sustained no findings of liability related to use of force in the fourth quarter so no entries were made.

SOP 42 has been revised and reflects the recommendations made in the Technical Assistance report.

Regarding PPB Case No. 11-050814 (IA Case No. 2011-C-0237), IA had commenced a full administrative investigation into this incident as noted in previous quarters. The investigation was finally completed on September 27, 2016 and East Precinct command staff wrote findings during this quarter. A Police Review Board (PRB) was held in this case on December 1, 2016 and a finding of sustained on the force allegation was recommended to the Chief. Paragraph 133(4) or (5) will be followed once the case is complete and the finding has been finished.

2016 Q1 Update: The Bureau sustained no findings of civil liability related to use of force in this quarter so no EIS entries were made.

2016 Q2 Update: The Bureau had no findings of civil liability related to the use of force this quarter so no EIS entries were made.

2016 Q3 Update: There were no findings of civil liability related to a member’s use of force this quarter so no EIS entries were made.

2016 Q4 Update: There were no findings of liability in civil court during the 4th Quarter of 2017 which related to any member’s use of force.

SOP 42 has been revised and reflects the recommendations made in the Technical Assistance report.

2017 Q1 Update: The Bureau sustained no findings of civil liability related to use of force in this quarter so no EIS entries were made.

2017 Q2 Update: The Bureau had no findings of civil liability related to the use of force this quarter so no EIS entries were made.

2017 Q3 Update: There were no findings of civil liability related to a member’s use of force this quarter so no EIS entries were made.

2017 Q4 Update: There were no findings of liability in civil court during the 3rd Quarter of 2017 which related to any member’s use of force.

SOP 42 has been revised and reflects the recommendations made in the Technical Assistance report.

2018 Q1 Update: There were no findings of liability in civil court during the 1st Quarter of 2018 which related to any member’s use of force. Given that, no EIS Performance Discussion Tracker entries were made.

2018 Q2 Update: The Bureau sustained no findings of civil liability related to use of force in this quarter, no EIS Performance Discussion Tracker entries were made.

2018 Q3 Update: There were no findings of civil liability which related to any member’s use of force during the third quarter.

2018 Q4 Update: There were no findings of liability in civil court during the 4th Quarter of 2018 which related to any member’s use of force so no EIS Performance Discussion Tracker entries were made.

2019 Q1 Update: The Bureau sustained no findings of civil liability related to use of force in this quarter, so no EIS Performance Discussion Tracker entries were made.

2019 Q2 Update: There were no findings of liability in civil court during this quarter which related to any member’s use of force.

2019 Q3 Update: There were no findings of liability in civil court during this quarter which related to any member’s use of force.
2019 Q3 Update: There were no findings of civil liability related to any PPB member’s use of force in this quarter and no EIS Performance Discussion Tracker entries were made. PSD SOP 42 remains in effect should such a finding occur.

2019 Q4 Update: There were no findings of civil liability related to any PPB member’s use of force during Q4 and no EIS Performance Discussion Tracker entries were made. PSD SOP 42 remains in effect should such a finding occur.

2020 Q1 Update: There were no findings of civil liability related to any PPB member’s use of force during Q1 and no EIS Performance Discussion Tracker entries were made. PSD SOP 42 remains in effect should such a finding occur.

2020 Q2 Update: There were no findings of civil liability related to any PPB member’s use of force during this quarter and no EIS Performance Discussion Tracker entries were made. PSD SOP 42 remains in effect should such a finding occur in the future.

2020 Q3 Update: There were no findings of civil liability related to any PPB member’s use of force during the third quarter and no EIS Performance Discussion Tracker entries were made. PSD SOP 42 remains in effect should such a finding occur.

2020 Q4 Update: In this quarter, Federal District Court Judge Hernandez found the City in violation of a TRO issued in the case of Index News Papers vs. City of Portland as a result of some actions by bureau members. As a result, the incidents in question are being investigated under case numbers 2020-C-0334 and 2020-C-0335.

2021 Q1 Update: There were no findings of civil liability as related to an officers use of force. SOP 42 remains in effect should such a finding occur.
Department of Justice Tasks / Quarterly Update Report

Task Description
CRC Membership

**Task Requirements:** The City shall expand the membership of the CRC to 11 members, representative of the many and diverse communities in Portland, who are neutral, unbiased, and capable of making objective decisions. The quorum of CRC members necessary to act may remain at its existing level.

**Status**  Assigned to IPR

**Action Steps:**
1. IPR will propose changes to City Code to accommodate requirements in this provision
2. City Council will vote on changes to City Code
3. IPR will solicit nominations for additional members to CRC in order to fulfill additional membership requirements

**Task Date Completed:**

**Evidence of Completion:**
1. Proposed changes to City Code 3.21.080 A (located in folder #128)

**Received DOJ Approval?**  No

**Approval**

**Status Note:**
2014 Q1 Update: City Council task.
2014 Q2 Update:
2014 Q3 Update:
2014 Q4 Update:
2015 Q1 Update:
2015 Q2 Update:
2015 Q3 Update:
2015 Q4 Update:
2016 Q1 Update:
2016 Q2 Update:
2016 Q3 Update:
2016 Q4 Update:
2017 Q1 Update:
2017 Q2 Update:
2017 Q3 Update:
2017 Q4 Update:
2018 Q1 Update:
2018 Q2 Update:
2018 Q3 Update:
2018 Q4 Update:
2019 Q1 Update:
2019 Q2 Update:
2019 Q3 Update:
2019 Q4 Update:

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Friday, May 7, 2021
**Task Description**

CRC findings of administrative outcomes

**Task Requirements:** The City and PPB agree that the CRC may find the outcome of an administrative investigation is unreasonable if the CRC finds the findings are not supported by the evidence.

**Status**

Assigned to IPR

**Action Steps:**

1. IPR will propose changes to City Code to accommodate requirements in this provision
2. City Council will vote on changes to City Code
3. IPR will ensure training for CRC members regarding this change to the policy

**Task Date Completed:**

- [ ] Received DOJ Approval? Approval

**Evidence of Completion:**

1. Proposed changes to City Code 3.21.080 (located in folder #128)

**Status Note:**

2014 Q1 Update: CRC task
2014 Q2 Update:
2014 Q3 Update:
2014 Q4 Update:
2015 Q1 Update:
2015 Q2 Update:
2015 Q3 Update:
2015 Q4 Update:
2016 Q1 Update:
2016 Q2 Update:
2016 Q3 Update:
2016 Q4 Update:
2017 Q1 Update:
2017 Q2 Update:
2017 Q3 Update:
2017 Q4 Update:
2018 Q1 Update:
2018 Q2 Update:
2018 Q3 Update:
2018 Q4 Update:
2019 Q1 Update:
2019 Q2 Update:
2019 Q3 Update:
2019 Q4 Update:
Department of Justice Tasks / Quarterly Update Report

2020 Q1 Update:
2020 Q2 Update:
2020 Q3 Update:
2020 Q4 Update:

2021 Q1 Update: IPR's responsibility
2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:

2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

Friday, May 7, 2021
Department of Justice Tasks / Quarterly Update Report

Task Description
CRC appeal process / request for additional investigation

Task Requirements: In its review process for purposes of the appeal, the CRC may make one request for additional investigation or information to the investigating entity. i.e. PSD or IPR at any point during its review. See Agreement for specific requirements, #136.

Status  Assigned to IPR

Action Steps: 1. IPR will modify City Code pertaining to Citizen Review Committee to clarify procedures for requests for additional investigation or information during an appeal process.
2. Code Changes will be presented to City Council at a public hearing

Evidence of Completion:

Task Date Completed:  Received DOJ Approval?  Approval

Status Note:

2014 Q1 Update: CRC task but the Bureau's Professional Standards Division is prepared to address any one additional request for investigation or information from the CRC.

2014 Q2 Update:
2014 Q3 Update:
2014 Q4 Update:
2015 Q1 Update:
2015 Q2 Update:
2015 Q3 Update:
2015 Q4 Update:
2016 Q1 Update:
2016 Q2 Update:
2016 Q3 Update:
2016 Q4 Update:
2017 Q1 Update:
2017 Q2 Update:
2017 Q3 Update:
2017 Q4 Update:
2018 Q1 Update:
2018 Q2 Update:
2018 Q3 Update:
2018 Q4 Update:
2019 Q1 Update:
2019 Q2 Update:
2019 Q3 Update:
2019 Q4 Update:

Friday, May 7, 2021
**Task Description**

**Discipline Guide**

**Task Requirements:** PPB and the City shall develop and implement a discipline guide to ensure that discipline for sustained allegations of misconduct is based on the nature of the allegation and defined, consistent, mitigating and aggravating factors and to provide discipline that is reasonably predictable and consistent.

**Status**  Complete - pending external review

**Action Steps:**
1. PPB will work with IPR and outside auditing agency recommendations to develop discipline guide
2. PPB will review discipline guide with PPA
3. Following union review, PPB will implement discipline guide within PSD

**Task Date Completed:** 10/10/2013

**Evidence of Completion:** 1. Final Draft discipline guide

**2014 Q1 Update:** The finalized Discipline Guide became effective March 1, 2014.

**2014 Q2 Update:** The new Discipline Guide Directive 338.00 was posted for Universal review and public comment on May 1, 2014. It was still in Executive Reconciliation stage at the end of this quarter.

**2014 Q3 Update:** After much discussion during the lengthy period of Executive Reconciliation, command staff decided to re-post this Directive and all involving the Discipline Process for Universal review. This was done on September 1, 2014 for another 30 days. At the end of this quarter, it was once again in Executive Reconciliation. So no changes to the Guide itself were effectuated to this point.

**2014 Q4 Update:** The new Directive 338.00 which contains the Discipline Guide was finally enacted on October 30, 2014. It is being utilized by PPB on a regular basis at this time.

**2015 Q1 Update:** The Discipline Guide remains in effect and is utilized

**2015 Q2 Update:** The Discipline Guide which is contained in Directive 338.00 was posted for the 30 day universal review on April 1, 2015 for its required 6 month review. It is now in the Executive Reconciliation phase of the process.

**2015 Q3 Update:** Directive 338.00 remained in Executive Reconciliation phase during this quarter.

**2015 Q4 Update:** The relevant directive remained in the Executive Reconciliation phase during this quarter, awaiting the review of the entire 300 series of directives by DOJ, COCL and PPB. These will be addressed once the current analysis of the overarching accountability system has been completed. However, to document for DOJ that the Discipline Guide in effect is being utilized, a check box has been added to the Corrective Action Recommendation memorandum. To assure that all were aware of this, an email was sent to command staff on December 2, 2015 informing them of this new requirement. Further, the relevant SOP #34 was updated to reflect this.

From December 2 through December 31, 2015, there were 2 instances in which the updated Corrective Action Recommendation (CAR) should have been used. Although both RU commanders used the old form, each affirmed they referred to the Discipline Guide before recommending the corrective action.

**2016 Q1 Update:** A check box has been added to the Corrective Action Recommendation memorandum requiring command to attest that the discipline guide was utilized prior to making any corrective action recommendation. In addition, an email was sent out informing ALL command staff of this new requirement. Command staff was reminded of this new requirement via a second email sent by the Discipline Coordinator on January 22, 2016.

SOP #34 (Discipline Guide) was updated to reflect this new requirement.

**2016 Q2 Update:** Since the new check box has been added to the Corrective Action Recommendation, IA has reviewed each memo to ensure the box is checked and the discipline guide was reviewed.

**2016 Q3 Update:** Since the new check box has been added to the Corrective Action Recommendation memorandum, IA has reviewed each memo to
make sure the box is checked and the discipline guide was reviewed.

2016 Q4 Update: Since the new check box has been added to the Corrective Action Recommendation memorandum requiring command to attest that the discipline guide was used, IA has reviewed each memo to assure the box is checked and the discipline guide was reviewed.

2017 Q1 Update: Again this quarter, PSD staff has reviewed each Corrective Action Recommendation memo to assure that the box is checked to attest that the Discipline Guide was reviewed and used.

2017 Q2 Update: PSD staff continued to review each Corrective Action Recommendation memo to assure that the box is checked to attest that the Discipline Guide was reviewed and used.

2017 Q3 Update: IA staff has reviewed each memo to make sure the box is checked that the Discipline Guide was reviewed and utilized in the process.

2017 Q4 Update: IA has reviewed each memo to assure the box is checked that the Discipline Guide was reviewed and used in the process.

2018 Q1 Update: The Corrective Action Recommendation memorandum has a checkbox requiring command to attest that the discipline guide was used; IA has reviewed each memo to make sure the box is checked and the discipline guide was reviewed.

2018 Q2 Update: The Discipline Guide remains in effect and is utilized. This is evidenced by IA's review of the checkbox on the Corrective Action Recommendation memos which was checked on each to attest the guide was used.

2018 Q3 Update: The Discipline Guide remains in effect. IA has reviewed each Corrective Action memo to make sure the box is checked to confirm that the guide was reviewed and used in the process.

2018 Q4 Update: The Discipline Guide remains in effect. The Corrective Action Recommendation memorandum has a checkbox requiring Command to attest that the discipline guide was used; PSD has reviewed each memo to make sure the box is checked and the discipline guide was reviewed.

2019 Q1 Update: The Discipline Guide remains in effect. PSD has reviewed each memo to make sure the box is checked that the discipline guide was reviewed.

2019 Q2 Update: The Discipline Guide remains in effect. PSD staff has reviewed each Corrective Action memo to assure the box is checked indicating the discipline guide was reviewed in the process.

2019 Q3 Update: The Discipline Guide remains in effect. PSD staff has reviewed each Corrective Action memo to assure the box is checked indicating the discipline guide was reviewed in the process.

2019 Q4 Update: The Discipline Guide remains in effect. The Corrective Action Recommendation memorandum has a checkbox requiring command to attest that the discipline guide was used; PSD has reviewed each memo to make sure the box is checked and the discipline guide was reviewed.

2020 Q1 Update: The Discipline Guide remains in effect. The Corrective Action Recommendation memorandum has a checkbox requiring command to attest that the discipline guide was used; PSD has reviewed each memo to make sure the box is checked and the discipline guide was reviewed.

2020 Q2 Update: The Discipline Guide remains in effect. The Corrective Action Recommendation memorandum has a checkbox requiring command to attest that the discipline guide was used; PSD has reviewed each memo to make sure the box is checked and the discipline guide was reviewed. One recommendation form was not signed but the PRB Coordinator confirmed with the Commander that she had checked the box.

2020 Q3 Update: The Discipline Guide remains in effect. The Corrective Action Recommendation memorandum has a checkbox requiring command to attest that the discipline guide was used; PSD has reviewed each memo to make sure the box is checked and the discipline guide was reviewed.

2020 Q4 Update: The Discipline Guide remains in effect.

2021 Q1 Update: The Discipline Guide remains in effect.

Friday, May 7, 2021
The Corrective Action Recommendation memorandum has a checkbox requiring command to attest that the discipline guide was used; PSD has reviewed each memo to make sure the box is checked. The Discipline Coordinator has provided results and supporting documents to SSD.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

Friday, May 7, 2021
Department of Justice Tasks / Quarterly Update Report

Task Description
Complaint filing and tracking on the Internet

Task Requirements: The City shall enhance its existing website to ensure that a complainant can file and track his or her own complaint of officer misconduct.

Status Actively in Process

Action Steps:
1. IPR will continue to provide an online option for filing complaints in multiple languages.
2. IPR will identify opportunities for complainants to track complaints through the investigatory process following the initial filing.

Task Date Completed:


Status Note:
2014 Q1 Update: IPR's task.
2014 Q2 Update:
2014 Q3 Update:
2014 Q4 Update:
2015 Q1 Update:
2015 Q2 Update:
2015 Q3 Update:
2015 Q4 Update:
2016 Q1 Update:
2016 Q2 Update:
2016 Q3 Update:
2016 Q4 Update:
2017 Q1 Update:
2017 Q2 Update:
2017 Q3 Update:
2017 Q4 Update:
2018 Q1 Update:
2018 Q2 Update:
2018 Q3 Update:
2018 Q4 Update:
2019 Q1 Update:
2019 Q2 Update:
2019 Q3 Update:
2019 Q4 Update:
2020 Q1 Update:

Friday, May 7, 2021
<table>
<thead>
<tr>
<th>Year</th>
<th>Quarter</th>
<th>Update</th>
</tr>
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<tbody>
<tr>
<td>2020</td>
<td>Q2</td>
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<td>2020</td>
<td>Q3</td>
<td></td>
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<tr>
<td>2020</td>
<td>Q4</td>
<td></td>
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<tr>
<td>2021</td>
<td>Q1</td>
<td>IPR's responsibility</td>
</tr>
<tr>
<td>2021</td>
<td>Q2</td>
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<td>2021</td>
<td>Q3</td>
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<td>2021</td>
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<td>2022</td>
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<td>2022</td>
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<td>2022</td>
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<tr>
<td>2022</td>
<td>Q4</td>
<td></td>
</tr>
</tbody>
</table>
### Task Description
Complainant documentation requests protocols

### Task Requirements:
Within 120 days of the Effective Date, the City shall review its protocols to ensure that the City shares with complainants requested documentation about his or her own complaint to the extent permitted by law.

### Status
Complete - pending external review

### Action Steps:
1. Ensure PSD SOP regarding sharing of information with complainants complies with requirement of this provision

### Task Date Completed:
10/4/2013

### Evidence of Completion:
1. PSD SOP #14

### Status Note:
IPR performs this function for complainants in these cases rather than PPB.
Department of Justice Tasks / Quarterly Update Report

2020 Q3 Update:
2020 Q4 Update:
2021 Q1 Update: IPR's responsibility
2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

Friday, May 7, 2021
<table>
<thead>
<tr>
<th>Task Description</th>
<th>140</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complaint tracking numbers and assignment information for complainant</td>
<td></td>
</tr>
<tr>
<td><strong>Task Requirements:</strong></td>
<td>The City shall ensure that IPR provides each complainant a tracking number upon receipt of the complaint, informs each complainant of the complaint classification, assignment (precinct or IA) and outcome of the complaint (sustained, unproven, etc.) in writing (whether mail, email/text, or fax), including information regarding whether the City took any corrective action. The City Attorney’s Office shall determine whether disclosures regarding corrective action are required on a case-by-case basis consistent with Oregon’s Public Records Law.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Actively in Process</td>
</tr>
<tr>
<td><strong>Action Steps:</strong></td>
<td>1. IPR will work with complaint tracking software company to enhance existing software in order to meet the requirements of this provision.</td>
</tr>
<tr>
<td><strong>Task Date Completed:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Received DOJ Approval?</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Evidence of Completion:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Approval</strong></td>
<td></td>
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</tbody>
</table>

**Status Note:**
- **2014 Q1 Update:** IPR's task.
- **2014 Q2 Update:**
- **2014 Q3 Update:**
- **2014 Q4 Update:**
- **2015 Q1 Update:**
- **2015 Q2 Update:**
- **2015 Q3 Update:**
- **2015 Q4 Update:**
- **2016 Q1 Update:**
- **2016 Q2 Update:**
- **2016 Q3 Update:**
- **2016 Q4 Update:**
- **2017 Q1 Update:**
- **2017 Q2 Update:**
- **2017 Q3 Update:**
- **2017 Q4 Update:**
- **2018 Q1 Update:**
- **2018 Q2 Update:**
- **2018 Q3 Update:**
- **2018 Q4 Update:**
- **2019 Q1 Update:**
- **2019 Q2 Update:**
- **2019 Q3 Update:**

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**Friday, May 7, 2021**
Establishment of Community Oversight Advisory Board (COAB)

**Task Requirements:** Establish the Community Oversight Advisory Board.

See specific requirements regarding the establishment and functions of the COAB in the Agreement, #141-#145.

**Status** Pending COCL selection

**Action Steps:**

- **Evidence of Completion:**
  - Received DOJ Approval?
  - Approval

**Evidence of Completion:**

<table>
<thead>
<tr>
<th>Year</th>
<th>Update</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014 Q1</td>
<td>Update</td>
<td>DOJ Compliance team participated in the ongoing meetings that are held related to this process and the creation of an application for interested citizens.</td>
</tr>
<tr>
<td>2014 Q2</td>
<td>Update</td>
<td>DOI Compliance team continued to attend all the meetings scheduled by the City Commissioner related to the creation of a COAB and provided feedback related to the application form for the at-large members. Process is ongoing as no COAB members have been named.</td>
</tr>
<tr>
<td>2014 Q3</td>
<td>Update</td>
<td>PPB's DOJ Compliance team continued to attend any meetings scheduled by the City Commissioner to discuss this process but most of the focus of meetings this quarter was on the COCL selection. The City indicated it will return to this effort after the COCL is named. The process for choosing the 5 at-large members remains to be decided.</td>
</tr>
<tr>
<td>2014 Q4</td>
<td>Update</td>
<td>The COCL was selected by the City Council on November 12, 2014. Attention then returned to the COAB and need to establish the process for the selection of the 5 at-large members. The Compliance team attended all the meetings scheduled for this purpose. By the end of the quarter, the process had been identified and an accelerated plan for posting the announcement and soliciting applications from a broad swath of community members was adopted so that final selections could be made by the 3rd week in January. A proposed calendar was adopted wherein the COAB would receive training on February 2, 2015 and their first meeting would be held on February 9, 2015.</td>
</tr>
<tr>
<td>2015 Q1</td>
<td>Update</td>
<td>The membership of the COAB as outlined in the Agreement was announced on January 22, 2015. The proposed calendar for a training session on February 2 and the first meeting on February 9 was followed.</td>
</tr>
<tr>
<td>2015 Q2</td>
<td>Update</td>
<td>The COAB met twice per month during this quarter to address its business.</td>
</tr>
<tr>
<td>2015 Q3</td>
<td>Update</td>
<td>The full COAB met monthly during this quarter, and its various subcommittees also met as scheduled throughout the quarter.</td>
</tr>
<tr>
<td>2015 Q4</td>
<td>Update</td>
<td>The full COAB met twice per month during this quarter and the three major subcommittees met at least once a month. PPB fully participates in all of these meetings.</td>
</tr>
<tr>
<td>2016 Q1</td>
<td>Update</td>
<td>The full COAB met twice per month during this quarter. The subcommittees, totalling four active ones, met at least once a month. PPB fully participates in all of these meetings.</td>
</tr>
<tr>
<td>2016 Q2</td>
<td>Update</td>
<td>The full COAB experienced a number of issues this quarter including interruptions of its meetings by community activists that caused a number of monthly meetings to be abruptly halted or cancelled. Thus the COAB did not meet as often as it has in previous quarters. However, PPB representatives participated in the meetings that were held.</td>
</tr>
<tr>
<td>2016 Q3</td>
<td>Update</td>
<td>The full COAB only met in July this quarter</td>
</tr>
<tr>
<td>2016 Q4</td>
<td>Update</td>
<td>The full COAB meet twice in the fourth quarter and the COCL held one Town Hall. Both the Accountability, Data Systems, Use of Force &amp; Compliance subcommittee and the Mental Health Crisis Response subcommittee met once during the quarter.</td>
</tr>
<tr>
<td>2017 Q1</td>
<td>Update</td>
<td>The COAB was discontinued by Portland Mayor Ted Wheeler at their January meeting. There were no other full or subcommittee meetings during the quarter.</td>
</tr>
</tbody>
</table>
Department of Justice Tasks / Quarterly Update Report

2017 Q2 Update: There were obviously no COAB meetings this quarter as the board has been disbanded. However, the City worked diligently to create the framework and duties of a successor advisory board that would meet the requirements of the agreement and function more ably.

2017 Q3 Update: The City continued its efforts to revise its proposal for a new advisory board to meet the demands of the community members who provided feedback. A final version was presented to City Council as part of the package of proposed amendments to the Settlement Agreement.

2017 Q4 Update: The Mayor's office is taking responsibility for all aspects of the development of the successor advisory board, PCCEP. The Board has not yet been assembled but the preparatory work is underway.

2018 Q1 Update: This responsibility lies with the Mayor's office. This quarter strides were made in terms of hiring consultants who will help with the application and selection process for the new members. Further a time line was established for the completion of the various tasks leading to holding its first meeting.

2018 Q2 Update: The Mayor's staff selected two consultant groups to help with the PCCEP application and selection process. The application was created, a community awareness campaign was undertaken to seek a broad and diverse pool of applicants and a deadline of July 1, 2018 was set for submission of applications. A decision was made to expand the membership to include two (2) youth representatives.

2018 Q3 Update: The City ultimately received 107 applications. A PCCEP selection advisory committee reviewed those and first whittled down the number to those who met the specified qualifications. The committee then narrowed the field to approximately 23 for purposes of initial interview. Following those interviews, the committee sent the names of the individuals it recommended to serve as members as well as the names it recommended as alternates to the Mayor. The Mayor and a member of his staff, a member of the selection committee and a representative from DOJ or COCL then met with each of those persons. After careful consideration, the Mayor selected 13 members and 5 alternates (3 adults and 2 youth). The PCCEP members began their on-boarding process shortly thereafter.

2018 Q4 Update: During this quarter, the newly-formed PCCEP finished its orientation process and held its first public meeting on November 28, 2018. Its first order of business was to enact bylaws and construct its governance structure. At its second meeting on December 17, 2018, members discussed possible subcommittees to assist with the body of work of the entire group. They then received a training on the DOJ Settlement Agreement by Assistant US Attorney Jared Hager and City Attorney Tracy Reeve.

2019 Q1 Update: The PCCEP conducted monthly public meetings this quarter. It also formed four subcommittees including Race and Ethnicity; Mental Health; Youth; and the Settlement Agreement which began meeting on a monthly basis as well.

2019 Q2 Update: The PCCEP continued to hold monthly public meetings in this quarter. The subcommittees met each month as well.

2019 Q3 Update: The PCCEP continued to hold monthly public meetings in this quarter. The subcommittees met each month as well.

2019 Q4 Update: The PCCEP continued to hold monthly public meetings in this quarter. The subcommittees met each month as well.

2020 Q1 Update: The PCCEP held its monthly public meetings in January and February of this quarter. The subcommittees met then as well. However, due to the COVID19 situation and the Governor's order, the March meetings were cancelled. The PCCEP staff were then charged with creating a way to conduct these meetings through Zoom or some other platform in April and continuing until the situation is resolved so that this work continues.

2020 Q2 Update: The PCCEP held its monthly public meetings in April, May and June. In addition, after the death of George Floyd they organized weekly listening sessions on three occasions in June to provide an opportunity for community members to share their thoughts on the issues.

The four subcommittees met each month as well.

2020 Q3 Update: The PCCEP continued to hold its regular monthly meetings on the 4th Tuesday of the month. The four subcommittees also held their monthly meetings.

2020 Q4 Update: The PCCEP continued to hold its regular monthly meetings on the 4th Tuesday of the month. The four subcommittees also held
their monthly meetings.
Agendas and minutes or recordings of those meetings can be found on the PCCEP website.

2021 Q1 Update: The PCCEP continued to hold its regular monthly meetings on the 4th Tuesday of the month. The four subcommittees also held their monthly meetings. PCCEP is also heavily involved in the review of the Core Patrol Functions of PPB at the Mayor's request so they have organized meetings and surveys around that topic.
Agendas and minutes or recordings of those meetings can be found on the PCCEP website.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:

2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
**Department of Justice Tasks / Quarterly Update Report**

**Task Description**

CEO Plan

**Task Requirements:**
To ensure constitutional policing, to closely interact with the community to resolve neighborhood problems, and to increase community confidence, PPB shall work with City resources knowledgeable about public outreach processes to develop and finalize a Community Engagement and Outreach (CEO) Plan.

See specific requirements and additional timeline requirements outlined in the Agreement, #146.

**Status** Pending COCL selection

**Action Steps:**
1. Review PPB outreach methods and actual implementation with outside agencies and staff
2. Develop needs assessment through surveys and community input

**Task Date Completed:**

☑ Received DOJ Approval? Approval

**Evidence of Completion:**

**Status Note:**

2014 Q1 Update: Internal discussions are ongoing related to a framework for the Plan and the resources required for its implementation pending the appointment of the COCL.

2014 Q2 Update: Researched various CEO plans including the principles espoused by the City's ONI; drafted some documents as guides for the initiation of steps in the process; met with A/C on numerous occasions to move the PPB's effort forward while awaiting the selection of the COCL.

2014 Q3 Update: PPB designated Captain Chris Uehara as the point person for CEO Plan. While awaiting the selection of the COCL and COAB, the Bureau is organizing its internal advisory committee with representatives from each RU to review its current outreach and engagement efforts, resources needed for this effort as well as its capacity. The goal is to be prepared to collaborate with the COAB once it is convened.

2014 Q4 Update: The PPB's CEO Internal Advisory committee met on several occasions to begin the task of developing the Plan. The first meeting focused on the objectives, timelines, challenges and Agreement mandates. The Committee discussed breaking into 4 subcommittees of Data analysis; Outreach; Communications; and Research and Development. Each was given the task of collecting current outreach and engagement activities in which members of their particular RU participate so that it can be assembled for the COAB's eventual use.

At the second meeting, members met in their subcommittee and spent the time discussing the topics and creating action plans pertinent to their subcommittee. The community engagement information that members had gathered was provided to the Captain so that a master list could be created. Members were reminded to submit that info so that analysis could be conducted.

Additionally, discussions took place with Command staff as to how to proceed before the COCL and COAB are named.

2015 Q1 Update: With the selection of the COCL team and the members of the COAB as of the end of January, PPB looked to begin collaborating with both on the development of the CEO Plan. The first step was to conduct a community survey re: public's perception of PPB's outreach efforts and accountability. The COCL took the lead on developing the questionnaire in consultation with COAB and pursuing a contract with PSU to mail and collect the surveys. The COCL agreed to do the analysis and write the report of the findings. The COAB voted to approve the use of PSU at its March meeting. However, a question was raised re: the legitimacy of that vote so it was placed on the April agenda to be revisited. A review and analysis of the survey results is ultimately required to inform the CEO Plan.

Meanwhile, the COCL initiated discussions on the second major time sensitive requirement to hold at least 2 public hearings to gather input on PPB's current outreach efforts. The COAB CEO subcommittee addressed it as did PPB after direction from Judge DeMuniz. The PPB prepared an hour long presentation of its efforts, highlighting the various types of outreach currently being done as well as the mechanisms used to communicate that activity. The first public meeting was scheduled for April 2, 2015 in North Portland.

PPB members are participating on the subcommittee. The PPB anticipates that the subcommittee will provide additional input in...
areas outlined in the agreement that are not necessarily covered in the survey.

2015 Q2 Update: The June meeting of the CEO Plan subcommittee was comprised of a general discussion of timelines and strategies for outreach and work plans. The following week, the PPB internal CEO committee, chaired by Commander Chris Uehara, met. The meeting began with an update on changes to the chair of the COAB and a briefing on the first public hearing of the COAB. Captain Elmore reported on the prior week’s meeting of the COAB CEO subcommittee.

2015 Q3 Update: There was no July meeting of the CEO subcommittee. There were two meetings in August. These meetings included a review of the CEO Plan Timeline. Commander Chris Uehara shared some ongoing community engagement activities of the PPB as an initial look at these activities, inviting feedback and suggestions. An update on the community survey and committee budget was also discussed in the August meetings.

In order to assist in the CEO Plan development, the September meeting was attended by several of PPB’s different advisory boards’ members. These members informed the subcommittee of the ongoing work and projects of their groups which included the Slavic Advisory Council, Community Police Relations Committee, Homeless Youth Continuum, and the Training Advisory Council.

2015 Q4 Update: The plan is in the “initial assessment” phase of a six phase timeline proposal. The most recent timeline draft predicts that phase two “develop draft vision and framework for CEO plan” will begin in June of 2016. This timeline will be discussed in January of 2016.

There are a number of prerequisites to be completed before beginning the draft. One is the community survey. At the October CEOP subcommittee meeting, DHM VP, John Horvick, presented a draft of the Community Survey results. The CEOP also reviewed the COCL quarterly report with attention to the sections related to community engagement. Outreach plans were discussed. Conversations were also initiated regarding the timing of the required meeting of the COAB with the Mayor and Chief. On November 10th, PPB met with COCL to plan the November 19th presentation to COAB of PPB's ongoing outreach efforts. The parties agreed that the goal would be to engage in a dialogue as to what community engagement should look like from all perspectives.

At the November CEOP subcommittee meeting, participants reviewed the PPB partner survey questions from the 2014 PSU report. Suggestions were made for both improvements and additions to the questions for DHM’s consideration. Members of the CPRC were present to address their role in the review of the 2009 plan on racial profiling as noted in the Agreement. That committee will draft an update to the plan and present it to the CEOP around March of 2016. The committee also discussed the upcoming COAB presentation by Commander Uehara and Bureau members regarding current community engagement.

The CEOP subcommittee is working to develop a speaker’s bureau to inform community members about the COAB and to seek their involvement in the work of the COAB. At the December subcommittee meeting, talking points were outlined. These will be used to further develop messaging for the proposed speaker’s bureau.

2016 Q1 Update: During this quarter, the Community Engagement and Outreach subcommittee in coordination with PPB planned and scheduled Community Engagement Workshop for April 14, 2016. Community attendance was encouraged and PPB members participated in round table discussions to gain an understanding of community desires for engagement and outreach. It is expected that community feedback on three big questions will inform the development of the CEO plan. The three questions are: What do we want the relationship between PPB and the community to look like? What is PPB’s responsibility in that relationship? What is the community’s responsibility in that relationship?

Members of the CEOP expressed a desire to ask the three big questions of members of the city council in order that their thoughts are included. Also expected to inform the plan are the focus groups and any speaker’s bureau opportunities that might arise. The CEOP subcommittee is currently seeking a broad inclusion of community voices in the development of the CEO Plan. CEOP is in conversation with the COCL regarding national best practices for community engagement. After consolidation of various voices and feedback, CEOP will move to the next phase of plan development which is to frame recommendations for PPB.

2016 Q2 Update: The community workshop planned in the last quarter was held on April 14, 2016. Roundtables were set up to facilitate dialogue and each purposely seated a police officer, a COAB member and community members who attended. All were asked to discuss the
“three big questions” that had been developed by the CEOPS: What do you want the relationship between the community and police to look like? What is the police bureau’s responsibility to get there? What is the community’s responsibility to get there? Answers were shared from each table and collected to later inform the CEO Plan.

The May 19, 2016 CEOPS meeting was disrupted by a group of filmers and adjourned forty eight minutes after it began with no progress toward the main work on the agenda. However, on May 25, 2016, members of the CEOPS committee, including the chair and members of the PPB including the Commander of North Precinct, held a meeting with the Tongan, Samoan, and Pacific Islander communities at a church in East Portland to discuss the “three big questions” described above. A crowd of youth and elders numbering around forty participated in this lively and inclusive event.

The subcommittee did not meet in June so no further strides towards the CEO Plan were made.

2016 Q3 Update: The CEOP subcommittee of the COAB met once during the third quarter of 2016. That meeting took place in July. The COAB was on hiatus during the last part of the third quarter of 2016. Internal discussions regarding a community engagement plan continued.

2016 Q4 Update: The CEOP subcommittee did not hold any meetings during the fourth quarter so no progress was made by COAB on the CEO Plan. The Bureau continued its own internal efforts at community engagement.

2017 Q1 Update: The COAB was discontinued by Portland Mayor Ted Wheeler during its January meeting. Thus the CEOP subcommittee of the COAB did not meet nor post new documents during the first quarter of 2017.

However, the Bureau continued its own internal efforts at centralizing its community engagement activities by initiating a Community Engagement Unit that will be staffed initially by a designated full-time PPB officer and a Community Liaison Program Manager when hired.

2017 Q2 Update: The COAB no longer exists so PPB is awaiting its successor board to reignite efforts to collaboratively develop a community engagement plan.

In the meantime, PPB continues on a daily basis to engage in all manner and forms with the various communities of Portland. The Bureau's Community Engagement Unit (CEU) is up and running at full speed, with particular attention to the City's immigrant and refugee populations. The hiring process for the Unit's program manager was completed and the selected individual is now awaiting her background investigation.

2017 Q3 Update: The framework for the COAB's successor board was approved by City Council in late August as part of the ordinance containing proposed amendments to the Settlement Agreement. However, much preparatory work is still to be done before new members are chosen and work begins anew. PPB awaits the formation of the PCCEP so that the CEO Plan can be developed collaboratively as required.

However, the Bureau's daily efforts to engage the community continue unabated. Members are involved in a myriad of activities with a diverse group of communities throughout the metro area.

More specifically, this quarter the CEU worked on the development of a strategic plan, media messaging and crime prevention curriculum targeting 150,000 Slavic members. Seven Slavic media outlets were identified with whom to partner.

For the Somali community, the CEU created a five month curriculum for future crime prevention workshops.

PPB is also organizing a Hispanic Advisory Council (Latinex) which will launch in January, 2018 in order to give that population more visibility and greater voice.

2017 Q4 Update: PPB awaits the formation of the PCCEP so that the CEO Plan can be developed collaboratively as required.

However, the Bureau's daily efforts to engage the community continue. Members are involved in a wide spectrum of activities with a diverse group of communities throughout the metro area.

More specifically, this quarter the CEU worked to enhance the value of the existing community advisory councils by restructuring them to insure their self-governance and self-sufficiency. Community members of each now formulate the agendas and chair the meetings. Each is developing its own strategies to address the most critical issues and concerns facing that group to bring to the Chief's attention. This raised the legitimacy of the community-police initiatives.

The monthly crime prevention workshops for the Somali community continued to be held, with the most recent one bringing 180 families to the event.

Collaboration with the Mexican consulate remains a priority in these times as PPB participated in two separate day-long forums.
focused on immigration issues and the role of local police.

Further, the CEU engaged in a great deal of preparatory work, including surveys and community forums, in anticipation of the creation of Latinex, the newest bureau advisory council for Spanish-speaking individuals.

**2018 Q1 Update:** PPB awaits the formation of the PCCEP so that the CEO Plan can be developed collaboratively as required.

However, the Bureau's daily efforts to engage the community continue. More specifically, this quarter the CEU worked with the Somali community to conduct a two-hour workshop monthly for 100-150 Somali individuals. Each covered a different topic of interest to this community including drug education and prevention; partnerships with schools and youth education; and domestic violence and parenting laws. As a result of these meetings, some Somali women created an Empowerment group that met twice during this quarter with the goal of learning the rights of single women; how to engage with the police and other partners like schools; etc. Further the CEU created a relationship with the NGO Africa House and PPB participated in all day events on African youth rights. The Unit also created and conducted training for various members of law enforcement and prosecutors regarding Immigrant Crime Victims’ rights. The Bureau's advisory councils continued to meet. As an offshoot of the Muslim Council, a series of special trainings were organized regarding the safety of mosques, especially during Ramadan. The group also developed community talks on child abuse and incest which they have identified as issues.

**2018 Q2 Update:** PPB still awaits the selection of the PCCEP members so that the CEO Plan can be developed collaboratively as required.

However, the Bureau's daily efforts to engage the community continue. More specifically, this quarter the CEU worked with a variety of communities on concerns specific to each:

1. Monthly Refugee Police 101 Workshop at Catholic Charities (2 hours long sessions) - although the class size is much smaller as a result of the Travel Ban and lower number of admitted refugees, PPB officers have continued to deliver introductory crime prevention content to the newly arrived refugees. In the past quarter, there were approximately 60 refugees who had attended the workshop.

2. OCE has completed a three months pilot project with the IRCO (Immigrant and Refugee Community Organization) Family Center and had approximately 30 Somali mothers participated in monthly Refugee Youth Violence and Family Health workshops and community-based dialogues. A coordinator at the IRCO Family Center reached out to OCE for assistance with a group of Somali mothers whose elementary school age children started to exhibit behavioral red flags, such as truancy, marijuana use, tagging the apartment complex and shoplifting and other minor criminal offenses. PPB built a crime prevention curriculum tailoring it to the needs and expressed concerns of the Somali mothers and delivered 3-hours long classroom sessions, followed up by a community dialogue and IRCO staff brainstorming sessions on enhancing the Program later this year. The main result of this Pilot project is a continuation of engagement with the Somali mothers who reside in the Hacienda Apartment complex, a part of the Cully Neighborhood, and North Precinct officers, in particular the PPB Gang Enforcement Team.

3. OCE supported the Slavic Advisory Council (SAC) by connecting the SAC Media Team with the PPB Drugs and Vice Division Command Staff to build drug prevention community messaging, in particular focusing on the current opioid epidemic issues. A Sergeant with DVD Unit participated in the Slavic Family TV/Radio show discussed fundamentals of opioids abuse to include: drug abuse red flags, public health and a role of police in combatting this problem. The Slavic Family TV/Radio has a large Slavic audience of about 60,000 and we received a very positive feedback from the community and more requests for regular drug abuse related messaging. This was the first time PPB DVD directly addressed the Slavic community with preventative messaging.

4. OCE assisted the Muslim Advisory Council in coordinating a very first PPB/MAC IFTAR community dinner to celebrate the month of Ramadan. MAC community members spirited the idea of organizing a sit-down dinner with Portland officers and build human connections over a meal. MAC Iftar dinner took place at the PCC Work Center and about 50 PPB members attended the dinner and learned about the significance of Iftar, Islam 101 presentation by a local Imam and interacted with the Muslim...
community members.

2018 Q3 Update: Although the members were announced by the Mayor, that did not occur until the end of this quarter and their first meeting is not scheduled until the end of November. Thus no collaboration in this regard was possible this quarter. However, the Bureau's daily efforts to engage the community continued although some of the Advisory Councils take a break in the Summer, reconvening in September. Two are highlighted here:

Slavic Advisory Council – no meetings in July/August. The September SAC meeting was the first one in the new 2018/2019 season and focused on the following:

- SAC members decided to focus on two primary goals in 2019 and utilize all of their time and resources to assist:
  1. the Portland Police Bureau with the Hiring/Recruitment Program to hire more local Slavic/Russian speaking community members. SAC members want to see a more ethnically-diverse Bureau that is reflective of the Portland demographic makeup. Since there are about 150,000 Russian speaking members, it is reasonable to expect successful recruitment from within the Slavic community. One of the members pointed out that we are now seeing a “full cycle” of the USA-born Russian/Slavic community members who are fully integrated and more accepting of the law enforcement than their parents or older siblings.
  2. in developing a plan to disseminate recently translated DMV Driving Manual (Russian version) to the Slavic community and identify several key stakeholders to assist with the project (Slavic Churches, local Slavic businesses, and Slavic Media outlets).

SAC members will work on developing a cultural-appropriate strategy to connect the PPB recruiters with various Russian/Slavic stakeholders and engagement platforms. Two SAC members volunteered to promote the Cadet’s Program and engage Slavic youth to participate in the process and raise more positive awareness about overall civic engagement.

PPB assisted with the initial translation of about 5,000 copies. However, due to high demand, the Slavic business community is working on raising funds to self-publish more copies and distribute to those who still need it as well as newly arrived immigrants. SAC will use the Slavic Media to inform the vast community to self-advocate with the State of Oregon DMV to implement the Russian version into its regular publications.

In addition, SAC members have almost completed their mandatory ride-along with a patrol officer to raise their understanding and exposure to police work and culture. They will work with the bureau's Strategic Communications Team on producing a short video message for both the internal/PPB and external/Slavic community audience to capture some of their impressions and cultural biases about the police in general.

Muslim Advisory Council

In the last quarter, MAC established a workgroup to design a MAC logo that would illustrate culture, language, and combined vision, and be used in any official MAC correspondence and branding. The workgroup met several times and connected with a local NGO, “New Avenues for Youth,” a social enterprise that hires former houseless youth to work in art design and social messaging. New Avenues Creative Team designed the first MAC Logo that will be displayed on T-shirts.

In August, a Training Division officer conducted a two-hour Civilian Active Shooter Preparedness workshop at the local Mosque of a participating MAC member. This officer, along with a MAC member, met with the mosque members and the Imam and presented on the topic of “Things that you can do as an organization to prepare for an Active Shooter type event." Questions covered included:

- What community members should personally do in the unlikely event that they are there during an event
- What community members can expect from the police during an event
- How community members can prepare to provide emergency medical aid to any victims during or after an event

The workshop was received exceptionally well by the Mosque members and opened the doors to more crime prevention sessions requested by the community members. It should be noted that PPB had never been to that particular mosque before in this capacity and are looking forward to working closely with the Mosque community and integrating their input in the daily work of MAC/PPB.

2018 Q4 Update: The PCCEP held its first two public meetings in this quarter. PPB is anxious to begin working with PCCEP members on the CEO Plan as soon as PCCEP has completed its initial organizational tasks and sets this on its agenda.

In the meantime, PPB continues to engage with the community and track its activities. Some of the highlights include:
REFUGEE OUTREACH:
- OCE continues to build a long term partnership and collaboration with the Immigrant Refugee Community Organization (IRCO) Africa House leadership and their staff, focusing on a two-cultural/educational learning and loop; proactive crime prevention engagement; building trust and human connections with the Africa refugee staff who are providing direct services to the African refugee families and acting as a liaison and a conduit for PPB.

- OCE attends monthly meetings at IRCO Africa House, provides any relevant public safety updates and information; shares PPB related resources such as Sunshine Division programs; promotes RAL program; recruitment and hiring, as well as the PPB Cadet Program.

- OCE has connected the Africa House Youth Prevention Coordinator’s Team with the PPB Youth Division for further partnership and mutual assistance.

HACIENDA PROJECT
- OCE has started a year-long Hacienda Project, named after a Portland City Neighborhood (NE Cully /NE 60th) that focuses on a group of single Somali mothers residing in a specific apartment complex that has seen a drastic rise in criminal activity and gang recruitment of young Somalis. IRCO Asia House Center reached out to OCE for assistance with crime prevention workshops at that apartment complex, which grew into a multi-partnership/agency project.

- OCE has partnered up with PPB GET officers, IRCO Somali outreach workers, and case managers, PPS staff and IRCO mental health caseworkers in building a comprehensive, holistic and preventative strategy in addressing youth-at-risk issues; socio-economic disparities of a Somali refugee family and address a myriad of crime prevention issues.

IMMIGRANT OUTREACH:
- OCE has a joint multidisciplinary team of Slavic/Eastern European community organizations and stakeholders and working on developing a very first IRCO Slavic House. IRCO received a federal grant to build a Slavic Center that would be a one-stop-shop for all Slavic/Eastern European immigrants in the Portland metro area focusing on social/crime prevention services. PPB’s role is to create a comprehensive library of crime prevention content that would be translated into Russian by community-based interpreters as well as offer any other services/resources depending on the needs and community’s requests. This will be an on-going project/partnership, and OCE is planning to lead this effort until the foundation is built to incorporate other PPB members.

ADVISORY COUNCILS
OCE coordinated monthly meetings with both the Slavic and Muslim Advisory Councils; identifying some community-police based projects and engagement strategy for 2019. Both Councils had a December meeting set for a holiday gathering with other community members and spent the time reflecting back on the 2018 accomplishments and challenges.

Slavic Advisory Council was contacted by a Slavic Media Division of the Voice of America in D.C., (VOA) since they heard about our community-police partnership. VOA media team came to Portland in October and recorded a SAC meeting session followed by with a RAL with an East Precinct officer. VOA produced a 12 minutes Documentary on the SAC/PPB and the Slavic Community in Portland in Ukrainian and aired it both on TV/social media all over the globe. The Ukrainian version of the video has around 210,00 views (youtube/FB).

VOA also just produced a shorter version in English as well, please see the link: https://www.voanews.com/a/slavic-group-works-with-oregon-police-department-to-foster-understanding-in-immigrant-community/4770073.html

FOREIGN-BORN LABOUR TRAFFICKING OUTREACH/INVESTIGATIONS
OCE continues to be a lead Unit investigating FBHT cases; conducting preliminary/intake interviews with alleged FBHT victims, and continues to provide crime prevention workshops on the issue of FBHT; speaking engagements with various NGOs; Universities and Multnomah County Family Court Judges.
**2019 Q1 Update:** PCCEP continued to hold its monthly public meetings. A major topic of the March meeting was Community Engagement to prepare the way for PCCEP’s role in developing PPB’s CEO Plan. Chief Outlaw gave a presentation on the Bureau’s view of Community Engagement which is, and has been from the start, one of the three goals she has set for the Bureau. Community Engagement Unit Officer Haunsperger followed the Chief with a Powerpoint presentation on the PPB’s current efforts in this regard.

PPB is simultaneously in the process of developing a 5 year Strategic Plan of which one of the foci is Community Engagement. So PPB intends to use the information from that effort to inform its CEO Plan as well.

The Bureau will provide PCCEP with a template for the members to provide their input as to what the CEO Plan should contain. The goal is for the PCCEP to primarily focus on this task in May and June so that their recommendations will be forwarded to PPB for inclusion in a report to be drafted in July.

**2019 Q2 Update:** During this quarter, PPB asked PCCEP and its four subcommittees to provide recommendations for inclusion in the Bureau's CEO Plan as required. This was a topic of discussion at several subcommittee meetings as well as the general monthly PCCEP meetings in May and June. Several recommendations were approved by the PCCEP and forwarded to PPB for consideration.

**2019 Q3 Update:** PPB received three formal recommendations from the PCCEP for the CEO Plan. The Bureau incorporated all three in some manner into the final version of the Plan. Meanwhile, PPB continues to engage with the community and track its activities. Some of the highlights include:

**Muslim Advisory Council (MAC):**
In August, Central Precinct and PPB MAC officers attended an annual Muslim Arab Festival; the organizers gave PPB a booth to share information about recruitment, and Sunshine Division was present as well.

In July/August, OCE met with the MAC leadership group and developed an annual strategic plan for the Muslim council that entailed a comprehensive educational plan and monthly guest speakers from various PPB specialty units. MAC aims to produce quarterly educational flyers and newsletter that would contain educational messages and summaries of the PPB’s topics presented at the MAC meetings, such as drug abuse and prevention; BHU related information and resources; gun violence and at youth risk education and prevention; domestic and child abuse laws and prevention.

**Slavic Council**
In July, SAC officers attended the Slavic cultural festivals at Ventura park, and at their SAC/PPB booth presented materials about SAC, PPB recruitment, and other crime prevention materials. PPB Cadets were also present and interacted with the Slavic youth.

SAC Media team developed a strategic media plan for 2019-2020 that entailed a series of educational and crime prevention messages and interviews with various PPB specialty units. The Media team plans to publish monthly publications in the local magazines, and also partner up with the local Slavic TV station/radio to expand the audience platform.

In July, SAC members hosted a team of police command officers from Ukraine and connected them with the PPB Chief’s office/OCE and established a very first law enforcement partnership and international exchange. The Ukrainian delegation spent three days with PPB, attended many PPB meetings and presentations on the issue of assault investigations, internal affairs protocols, and challenges, and spent a day in Training Division observing training sessions and interacting with the students. The delegation and a PPB team went to the State Police academy in Salem, where they attended a series of roundtable discussions with several of the Oregon police chiefs and shared their experiences in building a democratic and progressive police force in Ukraine. This visit and efforts by the SAC members are a great illustration of PPB’s partnership with local community members.

**2019 Q4 Update:** The CEO Plan was completed and then approved by City Council in early October. The Bureau began work on the various aspects of the Plan immediately and will report back to PCCEP in the summer on its progress in each arena.

Meanwhile, PPB continues as usual to engage with the community and track its activities. Some of the highlights include:

**COMMUNITY ACTIVE SHOOTER PREPAREDNESS**
1. OCE became aware that the PPB Training Division had built an Active Community Shooter Preparedness (CASP) training with a primary focus to educate and empower various community stakeholders on building their resilience capacity and internal plans to effectively respond to and survive active shooter incidents. OCE recognized a need to proactively engage and offer this training curriculum to immigrant and faith-based communities, and tailor our training content to specific communities’ language and cultural frameworks. We focused on building an internal infrastructure comprised of trained police officers who would conduct CASP workshops in various segments of the Portland-based communities, and thus ensure that we deliver a consistent and standardized public safety message.

In October 2019, OCE partnered up with PPB Training Division and held a very first all-day training session “Train the Trainer” attended by 45 sworn police members and observed by a mental health clinician and three members of the Training Advisory Council (TAC). The development of the internal CASP program has proven to be highly successful as we have increased our capacity to provide these meaningful workshops, especially to historically hard-to-reach out to communities. Since the CASP training, our officers conducted over two dozen CASP workshops, to include going to Muslim mosques, Slavic Christian churches, Jewish Synagogues, and Immigrant and Refugee social services agencies and, for the first time, connected with these vulnerable communities. It is significant to note that many of our bi-lingual officers attended the training, and our strategic plan is to have these officers deliver CASP training in Spanish, Russian, Chinese, Arabic, Romanian, and Somali – as we continue to build and enhance our CASP platform.

2. On November 14, 2019, the Slavic Advisory Council (SAC) held a CASP workshop for a group of twenty-five Slavic Churches pastors and ushers at East Precinct. We recorded the entire session, and the Strategic Communications Unit (SCU) created a video session that we are now able to share with community members. The SCU also created a CASP workshop request form and built a page for the public to access and request an in-person training and/or a video link.

ADVISORY COUNCILS

Slavic Advisory Council (SAC) transitioned to a new leadership group and is currently fully self-sufficient as the PPB assumed a secondary role. SAC Media team created a six-month media messaging strategy comprised of monthly PPB/public safety-related topics for Russian speaking magazines, TV, and Russian radio segments. The SAC media team started to translate the PPB SCU monthly crime bulletins into Russian and created a distribution list to various Slavic-based stakeholders.

Muslim Advisory Council (MAC) build their media strategy and outreach to a wider Muslim community to include drafting of a first MAC bi-annual newsletter with crime prevention educational content. In December, MAC hosted a workshop on the upcoming Census process and the importance and a presentation by the members of the Portland Civic Life group. MAC members participated in the annual Sunshine Division holiday box event and joined many community members in putting together holiday food boxes for the communities in need. It was a great opportunity for the MAC members to interface with Sunshine division members and raised more awareness of the Muslim community.

Comprehensive refugee outreach:

OCE was a guest speaker at the very first Refugee women empowerment group hosted by Catholic Charities. On Dec 18, OCE interacted with 22 refugee women from seven different countries, some of them have been living in the USA for only about a month. It was a great opportunity to interface with refugee women in a positive and safe setting; provide rudimentary education on how to access police and the 9-1-1 system.

OCE continues to partner with a local organization World Oregon that connects PPB and our communities with various international visitors with social justice background who want to learn about the Portland Police Bureau’s efforts and best practices in working with communities to promote justice and proactively engage to mitigate violence and conflict. On Nov 21, OCE hosted a workshop with the international delegation from Kyrgyzstan and PPB Youth Division and BHU officers. The foreign delegation wanted to learn about PPB youth-based crime prevention strategies aimed at working with vulnerable communities, in particular with the Muslim youth demographic. The interactive meeting was highly valuable to PPB members as we have a significant number
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of Muslim and Russian speaking Muslim communities that we serve daily, and the PPB members had a unique opportunity to learn about the culture and historic barriers many Muslim immigrants face during their integration process.

2020 Q1 Update:

In this quarter, PPB staff continued to work as best they could on the various aspects of the CEO Plan given the COVID 19 crisis. The responsible parties met on a regular basis to provide updates on progress until March when the stay-at-home order took effect.

In the meantime, until March, PPB continued as usual to engage with the community and track its activities. Some of the highlights include:

**Muslim Advisory Council (January-February – did not meet in March)**

- MAC has developed a roadmap for the 2020 community outreach that entails a recruitment of Muslim Youth to participate at the monthly meeting and bring Youth related issues to the forefront of our Council. The plan consisted of contacting the PSU Muslim Arab Student Association and hold a meeting to promote the MAC and connect the student demographic with both MAC and PPB.

- MAC executive leadership has established quarterly in-person meetings with Chief Resch in order to maintain the lines of communication, update the Chief’s Office on any emerging safety concerns of the Muslim community and identify any critical Bureau needs with which MAC members can assist.

On February 6, 2020 the MAC Executive Team (chair, vice-chair and secretary) held their first meeting with Chief Resch, Captain Lovell, Sgt. Weinsberger (a MAC member) and discussed issues such as: the role of MAC in the Chief’s office; creating continuous public safety messaging aimed at marginalized communities; avenues to connect MAC members with other PPB’s divisions and the District Attorney’s Office and be a cultural resource and conduit to the larger Muslim community at times of crisis and needs. During that meeting, it was decided to create a short 10 minute video about the history of MAC, their work and accomplishments to date. The video production has now been put on hold, but once we resume our regular operations, MAC will work with OCE and Strategic Communications to produce such a video for both internal and external dissemination. The next step will entail a creation of a training video in the context of cultural awareness and procedural justice while interacting and serving Muslim community.

- Throughout the months of January and February, MAC members were working diligently to organize a 3rd annual Iftar Dinner set for May 7 at the IRCO gym, However, that had to be postponed due to COVID.
- MAC has partnered with the Sunshine Division to deliver food at various Mosque locations for the month of Ramadan and continues to connect Muslim community with PPB-based resources.

**Slavic Advisory Council:**

- In the month of January, SAC held its first meeting under the newly appointed community-based leadership. Since the establishment of the SAC, a PPB member was either a chair or a co-chair of the Council. However, as the Council grew and strengthened internally resulting from the community aimed capacity building process, three community members volunteered to lead the council in the next several years. The SAC’s leadership is now comprised of a chair, co-chair, secretary and a media liaison community member. Thus for the first time the Council has a full community-based capacity. During the January meeting, a guest lecturer from PBOT conducted a presentation on road safety. The media liaison, in partnership with both OCE and Strategic Communication, wrote an article on this topic for the Russian speaking magazine. (See attached Media Clips)

- On January 8, SAC members attended a City Council Session and presented on the work of SAC and history of the Slavic Community as the Mayor proclaimed the Slavic Heritage Week for the City.

- On January 9, SAC in partnership with IRCO held a first Slavic and Eastern European Cultural Heritage Fundraising event which attracted about 300 guests from both the mainstream and Slavic community. Chief Resch was in attendance and PPB was recognized for their continuous support and partnership with the Slavic community.

- During the February meeting, SAC hosted a book promotion event during which a local American pastor discussed his book about domestic violence abuse in Christian communities. Many Slavic pastors and community members attended the meeting and engaged in a dialogue about domestic violence in Slavic community and how to publicly address this prevalent stigma and serve
victims of abuse. The significance of this event is that the book was translated into Russian and its free E-version was shared with the SAC members and the PPB Domestic Violence Unit as a resource for their officers to share with possible Slavic victims of domestic abuse.

The SAC media person, in partnership with OCE and Strategic Communications Teams, wrote a February article on Active Shooter and published it in the local Russian speaking magazine (see attached article).

For the March publication, the SAC media team wrote about the COVID and PPB response to it and translated a message from Chief Resch as well.
Also, effective January 2020, SAC and PPB have renewed their partnership with the PSU Russian Language Department Flagship program and PSU students have started to intern with SAC.

Catholic Charities Partnership:

OCE has partnered with the Refugee Resettlement Program at the Portland Catholic Charities and is developing monthly workshop classes with their Refugee Women Empowerment Group. Those workshops focus on working with refugee women in addressing a myriad of topics relevant to their needs, cultural empowerment and navigation of social justice as they undergo the process of integration into the Portland community. So far, we only held two sessions in which we discussed the issues of parenting, child discipline, legal frameworks for child abuse and how to access assistance with DHS in order to improve their parenting skills and mitigate any cultural misunderstanding around child rearing differences. We will resume our monthly sessions later this year.

2020 Q2 Update:

Again, the restrictions resulting from the COVID 19 continued to affect some of the Bureau's efforts related to the CEO Plan. However, the staff in the various RUs worked on their pieces of the Plan to the best of their abilities. For example, the goal of creating a "General Assembly Council" comprised of the chairs and co-chairs of the Bureau's Advisory Councils was met. In May, the OCE coordinated and facilitated the first meeting of that group with the Chief of Police at the time, Jami Resch and Capt. Lovell. They held a meaningful discussion about the community engagement trajectory on a strategic level, discussed potential avenues for more integration between these council groups, sharing of cultural and historical perspectives, empowering each by informing the group of their unique challenges, issues that are the most relevant and of concern to their specific communities.

In addition, the plan to create a Latino Advisory Council came to fruition.
In May 2020, Captain Lovell and Ofc. Haunsperger met with civic advocates from the Latino community and, as a result of months-long conversations and preparations, held a very first LAC meeting via ZOOM. Sixteen representatives from the Latino community attended the meeting and represented the Latino faith-based community, the Latino business community, Latino youth demographic, and several Latino-based non-profit organizations, such as Hacienda, Latino Network, and Latino Media network.

Meanwhile, the other standing advisory councils, including the Slavic and Muslim, continued to meet via Zoom.
Please see supporting document for more details on outreach activities this quarter.

The Bureau also attempted to maintain many of its community engagement activities during this Quarter, all of the Chief's office advisory councils and forums had transitioned to the online-ZOOM, the only format of conducting their regular business comprised of monthly meetings, executive sessions with PPB and educational workshops.

2020 Q3 Update:

Over the course of the last three months, the Portland Police Bureau has expanded their Community Engagement Division from one lieutenant and an officer, to a captain, lieutenant, a sergeant, and five officers. The expansion of the community engagement team was a priority of the Chief of Police and in doing so, the efforts to make the unit larger were made known to the Portland Police Bureau and more importantly, the communities we serve. The new team was formed in late July and had many logistical and organizational obstacles to overcome before it was ready to be introduced as an organized unit.
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The purpose of the Office of Community Engagement (OCE) is to be responsible for assisting the City of Portland in maintaining, and fostering progressive relationships with all community members at large, and their representative parties. This includes, but is not limited to, advisory councils, faith based leaders, regardless of denomination, youth, and a vast range of organizational leaders. The Office of Community Engagement will assist the Portland community with the coordination of meetings, initiate and respond to invites to interact with the Portland community, and support the integration of establishing trust and legitimacy internally within the PPB and externally with the communities we serve.

PPB's Community Engagement plan endorsed by PCCEP remains focused on public involvement, communication, access, and training. Here are examples of each area:

1. Public involvement- Increase ongoing structural opportunities for meaningful community engagement and inclusion.

• July 29th, 2020 at 10am at Unthank Park, OCE was asked to join over forty African American men from the Portland community who met to share opinions on increasing Police relations and options for police reform and youth gun violence reduction. The group expressed their frustration with the removal of police efforts to proactively stop gun violence. They concluded that reform was necessary but abolishing police efforts was not smart on behalf of the Mayor and City Council. This conversation came after the egregious murders of two African American youth in the Portland not even weeks apart. The point was made that the African American community suffers from the repercussions of gun violence and no one has come to any organizations and asked what their needs are. OCE was welcomed and thanked graciously for coming out to support.

• August 8th, 2020 from 4-6pm OCE was asked if it was possible to post a car at K'unamokwst Park 5200 NE Alberta St, Portland, OR 97218. An African American family was having a birthday party for twin one year old girls. After a shooting earlier in the week in which two small children were struck by gun fire, the family was nervous about having the party outside. They reached out to OCE for a few hours of help. They welcomed police presence. The family expressed their frustration with the decision by city council and the mayor to disband the Gun Violence Reduction Team but was thankful OCE placed officers at the park for their safety.

• August 20th, 2020 at 3pm @ the Hacienda 6700 NE Killingsworth St, Portland, OR 97218. The program director of Hacienda asked that OCE partner with them as well as IRCO to assist in distributing care packages to their large housing development. The demographic of the development includes a large Somali and Hispanic community that is often underserved. Also in the past these cultures have shown a great distrust in the Portland Police Bureau due to language barriers, beliefs about corruption in law enforcement in their native countries and historical errors within the Portland Police Bureau regarding sensitive cases and the lack of information disseminated to the communities effected after a significant event.

The event was a major success, the community members knew that we were Portland Police Officers and asked if we could continue efforts in the near future to include them in community engagement opportunities.

• September 1, 2020 @ Happy Valley Office Depot at 8am. OCE was requested by a nonprofit organization titled “Journey Up.” The founder is a local school bus driver. She noticed a need for students who do without school supplies, hygiene supplies, and meals on a daily basis. The youth are Title I or Title X students. Journey Up provides items to students when they need them and have done this for the past 3 years. They now serve students from all over our city from Portland to Hood River. OCE supported and helped youth shop for items needed for school and introduced the unit to parents and youth.

2. Communication- Expand and improve existing communication strategies and techniques to better communicate with those who live, work, worship, and recreate, in Portland.

• OCE has been communicating with community members, local organizations, churches, school entities that have requested said resources to speak via zoom about Police interactions with protestors and when riots are declared by PPB. The aforementioned community entities have also requested ways to speak up against the riots and looting that have taken place in the city and have asked OCE to inform them on forums made available to the public to speak to the Police Bureau and town hall forums as they
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become available.
OCE has also begun responding to the location of significant events (i.e. flashpoints for protests, homicide scenes, crimes scenes that generate a large police response etc.) the same day or the following day to inform the public on what has taken place and communicate any information we can share to ease public concern and listen to public requests for the Police to be more present on the streets and in their community. Most of the concern has come from citizens unhappy with the up tick in property crimes, and shootings in their neighborhoods. OCE has been called upon on numerous occasions thus so and thanked for their response and transparency with the community. The objective of emphasizing and modeling a more transparent communication strategy is to give the community a place where they can objectively speak about their concerns for community safety and have direct contact with Portland Police personnel who can relay information directly to the Chief’s office and literally see the change requested, depending on the nature of the issue. Community members still want help from police, they do not want to be referred or passed along.

3. Access- Ensure accessibility to the agency for all communities including those with limited English proficiency and physical challenges.
• The best form of bi-lingual access has emerged through our advisory councils.
As a result of the COVID pandemic situation, during this Quarter, all of the Chief’s office advisory councils and forums had transitioned to the online-ZOOM, the only format of conducting their regular business comprised of monthly meetings, executive sessions with PPB, and educational workshops. See supporting documents for updates on the new Coalition of Advisory Groups (CAG) as well as the Bureau’s other Advisory Councils.
The new OCE team is still building the rapport with the advisory councils to evaluate more effective ways to enhance access to the Bureau based on cultural needs requested by the nationalities and protected classes represented on those advisory councils.

4. Training- Enhance knowledge of PPB and the public to better serve the diverse communities of Portland.
• OCE officers have taken part in a small series of Policing 101 public speaking and Bureau knowledge courses given by the Training Division’s Ofc. Leo Harris to better serve the public. OCE fields questions constantly from concerned community members regarding the safety of police officers and the safety of the public. There are more trainings to come as the unit has only been in existence for a few short months.
• There have been no in-person trainings or ride-alongs or other knowledge-based activities due to COVID-19 restrictions.
• For informational purposes, OCE has referenced PPB’s directives and policy manual that is available for public review on line.

2020 Q4 Update:
Unfortunately, the long-awaited expansion of the Community Engagement Unit that was implemented last quarter will be short-lived. Due to a shortage of personnel and greater PPB imperatives regarding response times for calls for service and the gun violence crisis that the City is now facing, a decision was made to return those newly-assigned officers back to precincts and patrol responsibilities as of Feb. 4, 2021.

Nevertheless, the group continued its community work during this quarter. OCE has participated in specific advisory council meetings at the request of representatives chairing those councils. OCE was invited to the African American Advisory council, Latino Council, Muslim Council, Slavic Council meetings. PPB holistically, is active in many advisory councils that engage our community and our attendance has been requested at a wide variety of oversite meetings including, but not limited to, Youth Educating Police (YEP), Portland Committee on Community- Engaged Policing (PCCEP), and Inter-Faith Peace and Action Collaborative Committee (IPAC), Behavioral Health Unit Advisory Council (BHUAC), the Training Advisory Council (TAC), the Equity & Inclusion Advisory Council. There have also been additional asks and continued efforts surrounding communication, community/public involvement, access, and training. These asks of the committees put in place by PPBs sensitivity to the communities we provide police service to and the DOJ settlement agreement, are fluid and consistently being maintained. The aforementioned advisory councils and committees are specific to the Office of Community Engagement and the Community Service Division.

On a weekly basis the Office of Community Engagement has partnered with Sunshine Division who is also in the Community Services Division, in distributing over 5,000 food boxes during weekly missions, community focused efforts hosted by the Sunshine Division, or OCE hosting community events. OCE and the Sunshine Division have also partnered with IRCO, Noho’s Hawaiian Grill, Home Depot, Catholic Charities, Topaz Farms, Delta Farms, US Bank, Dutch Bro’s, Target, Fred Meyer, Manna House Church, and many more to provide free resources by way of food boxes, hot meals, and continuing efforts with our shop.

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with a cop program. OCE has also taken lead on the One Cop National Faith in Blue efforts to reach and foster the partnership between Police and faith based communities. Although the event was one weekend, the relationship and contacts are more of a continuum. In addition to the external efforts of the Office of Community Engagement formed and internal engagement function and have tasked ourselves with continuing to respond to patrol calls to aid officers working the street at all three of our precincts. That also includes assisting CRT at homicide scenes to help provide any wrap-around services or resources to the victim family. We also respond to meeting requests from the Office of Youth Violence Prevention (OYVP) in a non-investigatory fashion to contribute to conversations concerning community based efforts to mitigate gun violence understanding that continuing outreach worker efforts are necessary and sometimes a more appropriate response to certain community events that have not risen to a criminal level.

Specific information regarding PPB's Advisory Councils:

Slavic Advisory Council (SAC)
- SAC members celebrated the 8th annual meeting (the council established in Dec 2012) and they highlighted the success stories such as the translation of the entire DMV manual, improved and enhanced social media messaging to a larger Russian speaking community; and the creation of direct media updates from the Chief’s office.
- Captain Tina Jones of Community Services Division attended a meeting and presented on the Unit’s work and PPB’s practices and infrastructure for media messaging and connecting with marginalized communities.
- Timur Holove from the Slavic Media attended a meeting offering his continued support to serve as a messaging platform for the bureau and assist in connecting us with the Slavic community.
- In December, SAC members met with the PPB members and shared stories of cultural holiday traditions and personal stories to even more connect with officers on human level.
- Chief Davis continued to attend the monthly meetings and provided timely and detailed updates re budget cuts and the operations branch-staffing plan.
- SAC membership increased by two new members, a war crime criminal attorney and a local pastor who had connected the Council with his faith-based community and onboard more community members to attend and observe our meetings.

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MUSLIM ADVISORY COUNCIL (MAC)
- Chief Frome, Chief Resch continues to attend monthly meetings and provide necessary updates and changes regarding public safety and the PPB's response to current challenges related to post-protest changes, such as staffing deployment plan, budget-driven operational priorities, and so forth.
- The MAC executive leadership decided to re-structure this council by creating a two-tier membership based-participation. Tier 1 would include MAC community members who are committed to regular attendance and participation, and Tier 2 are those MAC members who want to remain/or become “the friends of MAC”, be included in email/news distribution and advocacy, but do not have the time to commit to attendance as full times members. This system appeared to have attracted more support from the Muslim community who want to be involved and support the community-police relations. In the month of December, a male Uber driver of the Iraqi origin was tragically killed by gunfire in a tragic incident. The PPB MAC members immediately notified the MAC leadership to inform them of the event and develop a media-messaging plan to dispel possible community fears and narratives, such as a hate crime/anti-immigrant based criminal act. This incident truly highlighted a meaningful and trust-based relationship between PPB and a larger Muslim community and we will continue to learn from this incident in order to identify tangible and culturally appropriate avenues to connect with the community, provide timely information, and assist marginalized family members and their navigation of criminal justice system.
- Two MAC members, Imam Polovina (Bosnian community) and Imam Najieb (African-American Muslim community) participated in the PPB Wellness Video Messaging expressing support to PPB officers and encouraging them to remain positive, community centric and healthy.

2021 Q1 Update:

Despite the reduction in the size of the Unit, the Community Engagement office was still extremely busy and productive this quarter. OCE has participated in specific advisory council meetings at the request of representatives chairing those councils. Some of the highlights include:

PPB ADVISORY COUNCILS:

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Coalition of Advisory Groups (CAG) – continues to hold bi-monthly meetings with the Chief's office and share their Councils' updates and needs and concerns of their respective communities. Assistant Chiefs Frome and Resch attended these meetings regularly, and the Chief when his schedule allowed, and continued to foster direct communication with the CHO.

Slavic Advisory Council (SAC)
- SAC endorsed and participated in the annual event “Slavic and Eastern European Heritage” Proclamation week event adopted by the Mayor and the City Council. SAC members shared their testimonials and promoted the work of the SAC, and raised awareness of the cultural and linguistic identity.
- Chief Davis continued to attend the monthly meetings and provided timely and detailed Bureau-related and relevant updates.

Muslim Advisory Council (MAC)
- Chief Frome and Chief Resch continued to attend monthly meetings and provide necessary updates and changes regarding public safety and the PPB’s response to current challenges related to post-protest changes, such as staffing deployment plan, budget-driven operational priorities, and so forth.
- The MAC leadership partnered up with the Multnomah County District Attorney’s office and invited a Senior DA Jeff Howey, to join the MAC. This was an intentional effort to engage with the DA’s office and learn more about the existing criminal investigations/prosecutions involving any Muslim community member. Jeff Howey attended meetings and presented on the current DA’s hate crime prosecution protocols and current cases.
- On February 6, PCCEP chairs attended the monthly meeting and presented the role and work of the PCCEP. This was the first time both entities engaged and started a path of mutual learning and partnership.

Latino Advisory Council (LAC)
- LAC members continued to meet monthly with the CHO and sharing the latest public safety updates and PPB’s related operational priorities and their impact on responding to calls for service.
- LAC members spent two sessions creating and adopting their internal Council Charter as a foundational and guiding document for this community council.

Asian American Pacific Islander Advisory Council (AAPIAC)
On March 17, Chief Lovell and the Office of Community Engagement met with the local AAPI community to discuss the aftermath of the Atlanta tragic events. In a two-hour conversation with community leaders from diverse ethnic AAPI communities, the community partners decided to establish the first AAPI Advisory Council to PPB. The group is currently developing its own administrative infrastructure and charter. They meet bi-weekly with the Chief to identify the most meaningful pathways for mutual trust-building, cultural awareness, and sustainable partnership.

DOJ COMMUNITY ENGAGEMENT PLAN AND MANDATES:
OCE has developed a training curriculum and lesson plans for a series of holistic and comprehensive Language and Cultural Awareness/Immersion educational videos to be delivered via a PPB LMS learning platform. The objective is to identify culturally respectful responses and develop various tools to help guide both police and marginalized communities to work together toward fostering a thriving and safe city. The Educational video series will be launched in May. Specific CHO Advisory councils (starting with the Latino, Muslim, Slavic, and AAPI) will participate in creating their specific Immersion segments and thus demonstrate community onboarding in training development and addressing equity procedural justice from their cultural and linguistic lens.

The Coalition of Advisory Groups (CAG) – bi-monthly meetings with the Chief's office

The Innovation Lab Team
The lab team established their Mission and Purpose that states:
The Lab develops sustainable, meaningful avenues and holistic strategies for community inclusion as part of the re-imagination of police services. Lab membership includes a cross-section of Bureau representatives focused on community engagement, training.
and policy as core areas through which to enact reforms. The LAB team presented the IT technical part of the current project, "The Repository," to the TPOB board, which then voted yes to proceed with the platform's technical development of the platform.

3. PPB ADVISORY COUNCILS:

Slavic Advisory Council (SAC)
-SAC endorsed and participated in the annual event "Slavic and Eastern European Heritage" Proclamation week event adopted by the Mayor and the City Council. SAC members shared their testimonials and promoted the work of the SAC, and raised awareness of the cultural and linguistic identity.
-Chief Davis continued to attend the monthly meetings and provided timely and detailed Bureau-related and relevant updates.

Muslim Advisory Council (MAC)
-Chief Frome, Chief Resch continues to attend monthly meetings and provide necessary updates and changes regarding public safety and the PPB's response to current challenges related to post-protest changes, such as staffing deployment plan, budget-driven operational priorities, and so forth.
-The MAC leadership partnered up with the Multnomah County District Attorney's office and invited a Senior DA Jeff Howey, to join the MAC. This was an intentional effort to engage with the DA's office and learn more about the existing criminal investigations/prosecutions involving any Muslim community member. Jeff Howey attended meetings and presented on the current DA's hate crime prosecution protocols and current cases.
-On February 6, PCCEP chairs attended the monthly meeting and presented the role and work of the PCCEP. This was the first time both entities engaged and started a path of mutual learning and partnership.

Latin Advisory Council (LAC)
-LAC members continued to meet monthly with the CHO and sharing the latest public safety updates and PPB's related operational priorities and their impact on responding to calls for service.
-LAC members spent two sessions creating and adopting their internal Council Charter as a foundational and guiding document for this community council.
-In January, Latino members spent a session crafting an initiative surrounding the use of Plain Language in policy development. They shared their memo with the Chief, who endorsed it, to address the language format used when creating a public-facing policy that impacts communities' safety and well-being, particularly the Limited English Proficiency communities.
-LAC members agreed to participate in the development of a meaningful and holistic video training series for PPB on Latino Cultural immersion and language
-On February 17, PCCEP chairs attended the meeting, presented the work of the PCCEP, and started to collaborate with the LAC.

Asian American Pacific Islander Advisory Council (AAPIAC)
-On March 17, Chief Lovell and the Office of Community Engagement met with the local AAPI community to discuss the aftermath of the Atlanta tragic events. In a two-hour conversation with community leaders from diverse ethnic AAPI communities, the community partners decided to establish the first AAPI Advisory Council to PPB.
-The group is currently developing its own administrative infrastructure and charter. They meet bi-weekly with the Chief to identify the most meaningful pathways for mutual trust-building, cultural awareness, and sustainable partnership.

4. DOJ COMMUNITY ENGAGEMENT PLAN AND MANDATES:
OCE has developed a training curriculum and lesson plans for a series of holistic and comprehensive Language and Cultural Awareness/Immersion educational videos to be delivered via a PPB LMS learning platform. The objective is to identify culturally respectful responses and develop various tools to help guide both police and marginalized communities to work together toward fostering a thriving and safe city. The Educational video series will be launched in May. Specific CHO Advisory councils (starting with the Latino, Muslim, Slavic, and AAPI) will participate in creating their specific Immersion segments and thus demonstrate community onboarding in training development and addressing equity procedural justice from their cultural and linguistic lens.
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2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:

2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
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Task Description: Development and implementation of CEO Plan

Task Requirements: The Chief’s Office, in consultation with the five PPB advisory members of the Community Advisory Board shall utilize the COAB’s recommendations in developing and implementing the Community Engagement and Outreach Plan. The Chief’s Office shall present the final proposed CEO (with implementation timeline) to the COAB for a vote of approval within 240 days of the effective date of the Agreement.

Status: Open

Action Steps:

Evidence of Completion: Yes

Received DOJ Approval? Approval

Status Note:

2014 Q1 Update: Awaiting naming of COAB members.

2014 Q2 Update: Awaiting naming of COAB members and their input.

2014 Q3 Update: Awaiting the selection of the COAB members and the completion of all the prerequisite work that is required before submission to the Chief for his action.

2014 Q4 Update: PPB continued to await the selection of the COAB members and the initiation of its work in order to proceed with developing and finalizing the CEO Plan.

2015 Q1 Update: COAB members were named on January 22, 2015 and held their first monthly meeting on February 9, 2015. The first two monthly meetings were focused on organizational structure. But due to the CEO timeframes in the Agreement, the need for the prompt development and distribution of the required community survey was discussed and approved by vote at the March meeting. This is a necessary prerequisite to the creation of a CEO Plan. Topics for subcommittees were identified and members eventually assigned based on interest. The CEO subcommittee will work with COCL on the questions for the survey.

In addition, it met once at end of March to discuss the first of two required town hall meetings on PPB outreach efforts which was scheduled for April 2nd. Those, too, are designed to inform the CEO Plan.

2015 Q2 Update: The COAB’s Community Engagement and Outreach Plan subcommittee (CEOP) was formed and began meeting on a monthly basis. PPB has an officer member on the committee and staff attend as well because the Agreement calls for this plan to be done in conjunction with one another. The first meetings focused on the selection of a vendor for distributing and analyzing the required community survey other than PSU. The choice to recommend to the City was finally determined and Council approved in early June. The survey was to be mailed by the end of June but that was delayed. The receipt of those results is a necessary element of the development of the CEO Plan. Meanwhile, a work plan will be created to guide the subcommittee’s ongoing efforts in this regard.

The first of the two required town hall meetings on PPB outreach efforts occurred on April 2nd. The meeting did not achieve its goals as the community evidently had different expectations of the purpose of the meeting. After debriefing the event, all agreed to pursue another strategy and format for the second required meeting. The date for that is anticipated now to be early Fall.

2015 Q3 Update: The feedback and engagement provided at the August 20th CEO subcommittee meeting focused the PPB and CEOPS members on the groundwork needed to move forward. Pre-subcommittee meetings were held, when possible, with the Chair and the PPB liaison to facilitate communication and planning for productive engagement between the PPB and the CEOPS. The September meeting, which included advisory board members, was an outgrowth of these understandings. This meeting was highly successful, allowing the CEOPS members to see some of the ongoing work of the PPB while probing how others might develop similar projects to serve their communities.

2015 Q4 Update: At the November meeting of the CEOP subcommittee, members discussed the upcoming presentation by Commander Uehara. The
committee discussed the need for a format in which individuals would listen to the presentation and offer feedback at the time as well as solicit wider community input later.

At the second November meeting of the COAB, a list of over 300 organizations with which PPB has ongoing relationships was distributed with the agenda. Commander Uehara and four members of the Bureau presented information on a few of the ongoing community outreach commitments and requested feedback from the community. Members of the COAB and public offered comments and suggestions during an extensive and engaging session. At the December CEOP subcommittee meeting, participants discussed improving attendance to the subcommittee and received a request from a community member to join the subcommittee. These efforts should assist with moving this effort forward. It was suggested that the plan timeline be updated to guide work in the coming year. A COCL staff member provided a draft of an updated timeline draft for discussion to the CEOP subcommittee chair, COAB chair, and PPB the day after the meeting.

2016 Q1 Update: The plan is still in the mapping phase. There have been no changes to the plan since last quarter. Changes are likely after the Community Engagement Workshop is conducted and data gathered at that event are discussed and incorporated into the mapping process.

Discussions continued at the CEOP subcommittee meetings throughout the quarter. The work plan was discussed at length at the February meeting. Included in these discussions were ideas for creation of focus groups. Also, the subcommittee in coordination with PPB has planned and scheduled Community Engagement Workshop for April 14, 2016. Community attendance is encouraged and PPB members will participate in round table discussions to gain an understanding of community desires for engagement and outreach.

2016 Q2 Update: The major accomplishment in this arena in this quarter was the Community Engagement Workshop that was held in April. A new format was designed to gain community input and as a result, the meeting was seen by all as a positive experience. However, the following CEOPS meeting was disrupted and terminated early so not as much follow up on pushing out the “3 Questions” discussions throughout the community as had been planned has occurred.

PPB itself scheduled one with the Tongan community and also attended a faith-based one that was organized by an attendee of the larger Workshop.

At the June CEOPS meeting, discussion revolved around the focus groups that were to be held to reach those who were missed in the mailed community survey. DHM will be running those in the next quarter.

2016 Q3 Update: The full development and implementation of the CEO plan is awaiting COAB participation. However, community engagement and planning continue within the bureau. An intern began work on a structure of a Youth Advisory Council and will continue with this work for the academic year. A strategic community engagement plan is being developed within the bureau to include mechanisms for capturing and reporting engagement activities.

2016 Q4 Update: While the full development and implementation of the CEO plan is awaiting COAB participation, community engagement and planning continue within the bureau. An intern from PSU’s Masters of Social Work program is continuing to work on a structure for a Youth Advisory Council. Other established advisory councils continued to meet regularly during the quarter. Numerous community outreach activities were held. A strategic community engagement plan is being developed within the bureau to include mechanisms for capturing and reporting engagement activities.

2017 Q1 Update: The COAB was discontinued by Portland Mayor Ted Wheeler during its January meeting; however, community engagement and planning continue with the bureau. A Community Engagement Unit is being created within PPB to coordinate all of the outreach and engagement activities in which employees participate. The intern from PSU's Masters of Social Work program continues to work on a structure for a Youth Advisory Council and will for the academic year. A strategic community engagement plan and data capture structures are being explored within the Bureau.

2017 Q2 Update: The COAB has yet to be reconstituted so no progress was made this quarter on the development of a CEO plan. However, PPB's internal efforts to centralize the outreach and engagement activities of all members made great strides as a result of the efforts of the officer assigned to the Bureau's new CE Unit.

2017 Q3 Update: The new PCCEP has not been organized yet so there is no progress to report regarding the development of a CEO plan. But the work related to coordinating and tracking the outreach and engagement activities of Bureau members as well as responding to the public's requests for members' attendance/participation at events is pressing forward.
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**2017 Q4 Update:** The new PCCEP still has not been organized at this point so there is no progress to report regarding the development of a CEO plan.

But the work related to coordinating and tracking the outreach and engagement activities of Bureau members as well as responding to the public's requests for members' attendance/participation at events advanced significantly. The Unit collaborated with IT to create an application for a simple and more efficient and effective method for collection of Bureau members' community engagement efforts.

**2018 Q1 Update:** The Bureau continues to await the organization of the new PCCEP so that efforts can be reinitiated regarding the development of a CEO plan.

Yet the work related to coordinating and tracking the outreach and engagement activities of Bureau members as well as responding to the public's requests for members' attendance/participation at events continued unabated. The Unit collaborated with IT to create an application for a simple and more efficient and effective method for collection of Bureau members' community engagement efforts. It was beta tested with a select group of officers and went Bureau-wide at the end of March.

**2018 Q2 Update:** The Bureau awaits the selection of the members of the new PCCEP so that efforts can be reinitiated regarding the development of a CEO plan.

Yet the work related to coordinating and tracking the outreach and engagement activities of Bureau members as well as responding to the public's requests for members' attendance/participation at events continued. The new phone app was fully implemented Bureau-wide which provides a simple and more efficient and effective method for collection of Bureau members' community engagement efforts.

Initial results indicate that during this quarter, 108 Portland Police Bureau (PPB) personnel submitted community engagement events, where 2,281 PPB personnel were identified in attendance. There were a total of 286 unique community engagement events captured, representing a minimum of 547 hours of time police spent with community members at these events. They also had a perceived attendance of 211,969 community members. The events identified range from large scale parades (Starlight, Pride, NAMI walks, etc.), School events (fairs, safety training, meet police events, Camp Rosenbaum), Neighborhood meetings (Arnold Creek, Lents, etc.), Advisory Council (Muslim Advisory Council, Slavic Advisory Council, Behavioral Health Unit Advisory Council, African American Advisory Council, etc.), and many other events from religious gatherings to bike registration.

**2018 Q3 Update:** The members of the new PCCEP were appointed by the Mayor at the end of this quarter. They will undergo an on-boarding process with a target of holding their first public meeting in November. After they get organized and develop a short term work plan, the Bureau expects that efforts will commence towards the development of a CEO plan.

In the meantime, the work related to coordinating and tracking the outreach and engagement activities of Bureau members as well as responding to the public's requests for members' attendance/participation at events continued. The new phone app is being utilized by some members to provide a more efficient and effective method for collection of Bureau members' community engagement efforts.

Initial results indicate that during the third quarter, there were a total of 151,671 community members at these events. Sixteen different languages were noted being spoken at community engagement events. They included Shop with a Cop (Izzy's Kids), Muslim Advisory Council (MAC), Camp Rosenbaum, National Night Out events, Word is Bond Gathering, Ortiz Center 20th Anniversary BBQ, Slavic Advisory Council (SAC) festival, Tonga festival, Immigrant and Refugee Community Organization meet, Hawthorne Blvd Business Association (HBBA) meeting, Youth Outreach Boxing Tournament, Civilian active shooter class, Somali Police workshop, as well as many more activities.

**2018 Q4 Update:** The PCCEP is now functional, having held its first two meetings this quarter. Members have been informed of their responsibilities and priorities. The CEO Plan is of highest importance at this time. PPB will provide the PCCEP with information for this purpose when the committee is ready to proceed with this task, hopefully early in 2019.

Meanwhile, PPB members continue to utilize the app developed to capture their numerous and varied engagement activities. The results from that source alone indicate 306 discrete community engagement events reported in this quarter. There were 71,305
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Community members in attendance at these events. Thirteen different languages were indicated as being spoken at these events. In all, a minimum of 661.75 hours of PPB personnel attendance were documented. These activities ranged from Coffee with a cop, Civilian Active Shooter Classes, Muslim Advisory Council (MAC), Community Peace Collaborative (CPC), African American Advisory Council (AAAC), Shop with a Cop, Holiday meal delivery, Immigrant and Refugee Community Organization (IRCO) event, and multiple neighborhood association meetings.

2019 Q1 Update: The groundwork for this critical task was laid out during this quarter. At the March public PCCEP meeting, the Chief gave a presentation on the Bureau's view of Community Engagement which is, and has been from the start, one of the three goals she has set for the Bureau. Community Engagement Unit Officer Haunsperger followed the Chief with a Powerpoint presentation on the PPB’s current efforts in this regard.

PPB is simultaneously in the process of developing a 5 year Strategic Plan of which one of the foci is Community Engagement. So PPB intends to use the information from that effort to inform its CEO Plan as well.

The Bureau will provide PCCEP with a template for the members to provide their input as to what the CEO Plan should contain. The goal is for the PCCEP to primarily focus on this task in May and June so that their recommendations will be forwarded to PPB for inclusion in a report to be drafted in July.

2019 Q2 Update: During this quarter, PPB attended PCCEP's various subcommittee meetings, provided a template and requested PCCEP's comment on what should be included in the Bureau's CEO Plan.

The full PCCEP voted on a number of recommendations for this purpose at the June meeting. PPB then began the process of reviewing those suggestions and coordinating the internal process for authoring the report as the quarter ended. PPB's goal is to complete a CEO Plan by end of August.

2019 Q3 Update: PPB worked on the specifics of the CEO Plan during the months of July and August. Staff utilized the recommendations from the PCCEP as well as the numerous public forums held for PPB's Strategic Planning process, its Equity and Inclusion plan and the work of the Community Engagement Unit. The Chief approved the Plan at the end of August. The final version was then forwarded to the PCCEP for review and public comment. In addition, it was provided to the Mayor and City Councilors who, per the PCCEP Plan, have to approve it.

The Chief was scheduled to present both the Annual Report and the CEO Plan on October 2, 2019.

2019 Q4 Update: The Chief presented the CEO Plan to City Council as scheduled on October 2, 2019. It was approved. Bureau members immediately began work on the action items and intend to report back to PCCEP in the summer regarding progress towards the goals.

2020 Q1 Update: The PPB staff charged with working on the various action items in the CEO Plan continued their tasks. The COVID 19 situation will likely have some effect on the timely achievement of some of the goals but others will be attainable as planned.

2020 Q2 Update: Work on the various action items in the CEO Plan continued with some substantial achievements including the creation of a General Advisory Council and a Latino Council. EIO pursued their efforts for community role with the Training Division although implementation will likely not occur until later Fall.

The Communications Office worked on strategies for better access to Bureau information as well, given the City's new website platform.

2020 Q3 Update: PPB continued to work on the various action items in the CEO Plan to the best of its abilities, given the limitations imposed by COVID. The General Advisory Council is off to a great start, meeting with the CHO every two weeks initially to share information and learn more about the functions of the various Councils and the Bureau.

The Latino Council is also very engaged with its first meetings focused on topics that will educate them on the organization and operations of the Bureau so that they have a fundamental knowledge from which to work.

EIO is still working with the Training Division to develop some LMS trainings that feature community members. That will be part of the on-line offerings for 2021 In-service.

The Communications team was hampered a bit by the implementation of the City's new website. It is being revamped to focus on services and not designed for the purposes for which PPB uses it. Staff is in process of migrating information to the new site but...
City hasn't turned PPB on to new website yet. However, the Unit did make a number of efforts in regard to translating various messages and documents into other languages, including protest info into 4 languages; COVID messages into Russian; used a Spanish interpreter for election information, etc.

2020 Q4 Update: PPB continued to work on the various action items in the CEO Plan to the best of its abilities, given the limitations imposed by COVID.
  • The CAG continues to hold bi-weekly meetings with the CHO and share their councils’ updates and needs and concerns of their respective communities. Chief Frome and Resch attended these meetings regularly and continue to foster direct communication with the CHO.
  • On Nov 6, the Coalition met with Mayor Wheeler and his staff to learn about how the CAG can assist and participate in the process of local police reforms discussions and efforts.
  • The Coalition spent several meetings creating a CAG directive and submitted it to the CHO for further review and input.

EIO, in conjunction with the Training Division, has developed some LMS trainings that feature community members. That will be part of the on-line offerings for 2021 In-service and the first will be issued in January.

The City is still in the process of implementing its new website. PPB Communications are preparing PPB’s information to be transferred to the new platform which is a challenge given the totally new format the City has adopted.

The Latino Advisory Council continued to meet monthly with the CHO sharing the latest public safety updates and PPB’s protest related operational priorities and their impact on responding to calls for service.
- LAC members spent two sessions creating and adopting their internal Council Charter as a foundational and guiding document for this community council.
- In December, Latino members spent a session with all of the Chiefs and shared their cultural holiday traditions and connecting on a human level in the effort to continue fostering trust and cultural humility.
- The Latino chairs recorded a video message aimed at the public to inform them of the creation of the Latino council. Local Portland media outlets covered this event and provided positive messaging about this new partnership. Please see video messages:
  - YouTube Unlisted: https://youtu.be/7TjMzbBgXg4
  - Portland police announces Latino Advisory Council | kgw.com

2021 Q1 Update: Efforts continued to be made on the various action items in the CEO Plan.

The CAG held bi-weekly meetings with the CHO and shared their councils’ updates and concerns of their respective communities.
- On February 8, the Coalition met with Mayor Wheeler and his staff to directly engage in the process of police reforms. Chief Lovell attended the meeting and shared some of the current challenges and priorities regarding public safety needs.
- The Coalition spent several meetings discussing the proposed PCCEP Core Patrol Services survey and met with PCCEP chairs to learn more about the process and avenues for minority groups to provide direct input.

The Latino Advisory Council met monthly during this quarter.
- In January, Latino members spent a session crafting an initiative surrounding the use of Plain Language in policy development. They shared their memo which addresses the language format used when creating a public-facing policy that impacts communities’ safety and well-being, particularly the Limited English Proficiency communities. The Chief endorsed the concept.
- LAC members agreed to participate in the development of a meaningful and holistic video training series for PPB on Latino Cultural immersion and language
- On February 17, PCCEP chairs attended the meeting, presented the work of the PCCEP, and started to collaborate with the LAC.

EIO, in conjunction with the Training Division, has developed some LMS trainings that feature community members. That will be part of the on-line offerings for 2021 In-service. The first was launched in January and they will continue for a number of months.

The OCE’s Educational video series that they have been developing with community members will be launched in May. Specific CHO Advisory councils (starting with the Latino, Muslim, Slavic, and AAPI) will participate in creating their specific Immersion
segments and thus demonstrate community onboarding in training development and addressing equity and procedural justice from their cultural and linguistic lens.

PPB's Communications Unit is still working on the migration of PPB's materials and information to the City's new website platform.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
Task Description: Community Survey of PPB Outreach Efforts

Task Requirements: The City, in consultation with COAB, will conduct a reliable, comprehensive, and representative survey of members of the Portland community, including civilians and PPB officers, regarding their experiences with and perceptions of PPB's prior community outreach efforts and accountability efforts and where those efforts could be improved, to inform the development and implementation of the CEO Plan.

Status: Actively in Process

Action Steps:
1. PPB will contract with outside agencies to conduct reliable surveys
2. PPB will utilize results of survey (and future comparative surveys) to develop CEO plan in consultation with COAB

Evidence of Completion:
1. Intergovernmental Agreement between the City and PSU to perform various community surveys
2. Ordinance authorizing IGA and PSU for surveys

Task Date Completed: Received DOJ Approval? Approval

Status Note:
2014 Q1 Update: PPB negotiated a contract with PSU for these surveys to be done once the COCL is in place and has provided input for the questionnaire.

2014 Q2 Update: Portland City Council decided to delay the appropriation of the funding for the follow-up survey until the COCL has been hired.

2014 Q3 Update: Awaiting the hiring and input of the COCL for this task.

2014 Q4 Update: The newly-named COCL Dennis Rosenbaum will deliberate on how the team wishes to proceed with this action--they must determine who will conduct the survey; how it will be done; and when it will be issued to random members of the community.

2015 Q1 Update: The COCL reviewed the prior community survey and took the lead on developing the new questionnaire in consultation with the COAB. With the City's assistance, he pursued a contract with PSU to mail and collect the surveys. The COCL agreed to do the analysis and write the report of the findings. The COCL voted to approve the use of PSU at its March meeting. However, a question was raised re: the legitimacy of that vote so it was placed on the April agenda to be revisited. A review and analysis of the survey results is ultimately required to inform the CEO Plan.

2015 Q2 Update: The second vote of the COAB did not support the selection of PSU as the survey contractor. Thus the City had to engage a whole new process. Ultimately, DHM was chosen with input from COAB. The COCL then worked with this group to develop the questions and methodology to be used. Although it was due to be distributed on June 26, as of July 30th it still had not been mailed out.

2015 Q3 Update: DHM, in collaboration with the COCL and with feedback from the COAB, developed the 2015 community survey to largely mirror the PSU 2013 survey. The initial postcard mailing of the survey was done on July 31 followed by the survey, a reminder, and a second copy of the survey. The survey was closed on September 2. Analysis of the data collected and a report will follow.

2015 Q4 Update: An initial draft of the survey results report was provided to PPB on October 6th. Soon after, a copy of the data was received and internal review of the analyses commenced. Some of PPB's initial questions were answered as analyses continued.

DHM VP, John Horvick, presented a draft of the report developed from the 2015 community survey to the CEOP subcommittee and answered questions from the group. Mr. Horvick requested feedback in order that questions or concerns could be addressed prior to the final report.

On November 10th PPB met with COCL, the City, and DHM to discuss concerns about reporting of actual response numbers in addition to the weighted numbers as well as other concerns and questions that had not been addressed. It was agreed that DHM
would include actual response numbers in the report along with a description of the impact of weighting on those numbers.

At the December CEOP subcommittee meeting, members discussed how the survey would inform their outreach efforts through the speaker’s bureau. Of particular interest was reaching communities that were underrepresented in the survey and other marginalized groups.

2016 Q1 Update: At the January 14 COAB meeting, DHM VP, John Horvick presented the report of the Community Survey results. On January 27, 2016, the City received the quote for interviews and/or surveys of community partners from DHM. On January 28, 2016, representatives from the City, PPB and COCL/COAB met to discuss the interview/survey options. After consideration and feedback from multiple members, it was decided that another survey of the community partners would not generate new information nor response from new organizations. Extensive interviewing was considered, but was cost-prohibitive at this time.

CEOP will utilize various efforts at the Community Engagement Workshop, in focus groups, and at other community events to gather further feedback on PPB’s outreach efforts. CEOP will particularly focus on the three big questions in gathering that feedback.

Community Engagement and Outreach Subcommittee meetings this quarter have focused on developing a presentation for use by a speaker’s bureau of the COAB. This presentation is meant to offer those invited from the COAB to speak to community members about their work with guidance for such a discussion.

2016 Q2 Update: The CEO Subcommittee met on April 21, 2016 to solidify the speaker’s bureau. PPB members will be invited to participate at events where a COAB representative from the speaker’s bureau participates and solicits more feedback on the “three big questions”. This information will inform the development of the CEO Plan along with the results from the workshop. A goal of June 30, 2016 has been set for the collection and inclusion of this community feedback.

CPRC gave a status report on the updating of the 2009 Racial Profiling Plan to the CEO subcommittee on April 21, 2016. The subcommittee invited CPRC to present its update to the full COAB in June of 2016. While the May 19, 2016 meeting was disrupted and terminated early and the June meeting was canceled, CEOPS has developed a presentation, included in the documents with this report, for inviting further community involvement. The written responses to the “three big questions” gathered and retained by the COEPS representatives at the community meeting on May 25, referenced above will be used in developing the plan.

PPB collaborated with the COAB to solicit feedback from the community on the “three big questions” in April to obtain more qualitative data to inform the COE Plan. The following month, PPB organized a meeting with the Tongan community and invited CEOPS members to obtain further feedback on the “three big questions” from other communities of color.

2016 Q3 Update: During the July 2016 meeting of the CEO Subcommittee, the one member present discussed with community members the plans for focus group recruitment and screening by DHM. This research will include six focus groups with representation from the LGBTQ community, houseless community and three focus groups for people with mental health issues. Focus groups were slated for August 15, 16, and 18.

2016 Q4 Update: The CEO Subcommittee did not meet in the fourth quarter.

In October, PPB, COCL, and DHM drafted the second citywide survey to be performed in service to this agreement. This survey is essentially the same as the first DHM survey conducted a year ago. Edits were made in response to feedback from multiple stakeholders. These edits were specifically intended to increase the clarity of questions, thereby increasing the ease and consistency of interpretation of results.

Surveys, as well as initial postcards and reminder postcards, were sent to 6,500 households in mid- to late-October. A second survey was mailed on November 3, 2016. It is anticipated that DHM will analyze the results and present findings in 2017 Q1.

2017 Q1 Update: A presentation on the latest DHM survey results was on the agenda for the January COAB meeting. However, the members decided to forego this agenda item in favor of other topics that evening. This is the second citywide survey to be performed by DHM in service to this agreement.

During this quarter, a final version of the survey report was forwarded to PPB after COAB was disbanded.

Friday, May 7, 2021
2017 Q2 Update: Given the lack of a functioning COAB, there is nothing new to report this quarter in this regard.

2017 Q3 Update: Given the lack of a functioning COAB, there is nothing new to report this quarter in this regard.

2017 Q4 Update: Given the lack of a new functioning advisory board as of yet, there is nothing new to report this quarter in this regard.

2018 Q1 Update: Because the new advisory board is not functioning as of yet, there is nothing new to report this quarter in this regard.

2018 Q2 Update: Although the PCCEP is not yet up and running, the Bureau has committed to doing a community survey in the future through the Police Foundation's National Platform. The Foundation is an independent, not-for-profit, non-member research organization which regularly conducts such surveys and will provide a summary of responses. Its goal is to provide law enforcement agencies across the country with an opportunity to compare their services, officers' perceptions, and programs with other agencies. The Bureau intends to wait until members are seated to share the proposed questions and receive PCCEP members' feedback before distributing the survey later in the Fall.

2018 Q3 Update: After discussions with the parties and for the sake of consistency and comparability, the City has decided to contract with DHM Associates again to conduct this community survey required by the Agreement. The expectation is that many of the questions will remain the same for purposes of analysis. However, the proposed questions will be posed to the new PCCEP members at their first public meeting in November. Their input will be solicited as to the questions already developed as well as suggestions for additional ones within the limitations of the subjects to be covered and the number and type that can be asked. Once that is received and vetted, the survey will be mailed to a representative sample of persons in Portland. The results will eventually inform the community engagement plan which is to be developed in the first year.

2018 Q4 Update: During this quarter, the City, COCL and DHM met and agreed upon the proposed questions for the community survey as well as a timetable for each step in the process. The survey was then shared with PCCEP and two representatives from DHM made a presentation to the members at their November meeting. Committee members had a number of questions and were then asked to submit feedback on the questions by mid December. Several comments were received, reviewed by the City, COCL and DHM at a meeting and incorporated into the final questionnaire. It is scheduled to go out at the end of January.

2019 Q1 Update: DHM Research administered this survey to residents of the City from January 25, 2019 to March 20, 2019 according to the agreed upon schedule. They received 1380 responses for a rate of 21%. DHM is now in the process of analyzing the data and writing a report. It is expected by the first of May.

2019 Q2 Update: The results of the community survey were issued at the end of May. A presentation by DHM and discussion of the report were on PCCEP's June agenda. However, the DHM representative was ill so the presentation was rescheduled for the July meeting.

2019 Q3 Update: DHM's presentation on the annual community survey was held at the July PCCEP general meeting. The PCCEP provided comments and questions as did public members. The PPB did utilize the results to inform aspects of its CEO Plan.

2019 Q4 Update: No further action was taken on the annual community survey this quarter.

2020 Q1 Update: No further action was taken on the annual community survey this quarter.

2020 Q2 Update: No further action was taken on the annual community survey this quarter.

2020 Q3 Update: No further action was taken on the annual community survey this quarter.

2020 Q4 Update: No further action was taken on the annual community survey this quarter.

2021 Q1 Update: No further action was taken on a community survey this quarter.

2021 Q2 Update: No further action was taken on a community survey this quarter.

2021 Q3 Update: No further action was taken on a community survey this quarter.

2021 Q4 Update:
Demographic data collection and development of programs

Task Requirements: PPB shall continue to collect appropriate demographic data for each precinct so that the Precinct Commander, together with the COAB, may develop outreach and policing programs specifically tailored to the residents of the precincts.

Status: Complete - pending external review

Action Steps: 1. Ensure that PPB policy incorporates the requirements of this provision

Task Date Completed: 5/23/2013  Received DOJ Approval? Approval

Evidence of Completion: 1. Demographic mapping

Status Note:

2014 Q1 Update: Discussions with Commanders were held to determine what demographic data should be collected for this purpose; SSD analyst is exploring what census tracking data should be used.

2014 Q2 Update: After consultations with Commanders and PSU, SSD analysts settled on which data elements to collect and report on for each precinct as well as the level of detail within the demographic releases to be used. Based on PSU’s recommendation, PPB will use the US Census rather than ACS now until later in the decade.

2014 Q3 Update: PPB continues to collect demographic data relevant to each precinct.

2014 Q4 Update: PPB continued to collect the designated demographic data by precinct for future use by the Commanders and the COAB.

2015 Q1 Update: PPB maintained its practice of collecting demographic data for each precinct for use by Command staff and others.

2015 Q2 Update: PPB continues to collect demographic data relevant to each precinct.

2015 Q3 Update: PPB continued to collect demographic data pertinent to each precinct. In this quarter, the analyst created additional maps and tables using current and historical census data to provide more details of the population living in each precinct.

2015 Q4 Update: PPB continued to collect demographic data pertinent to each precinct. Selected demographic tables and maps were utilized by an SSD analyst in order to explore the geographic context of traffic and pedestrian stops.

2016 Q1 Update: PPB continued to collect demographic data pertinent to each precinct. PPB created new summary tables using the recently released 2010-2014 5 Year American Community Survey data from the Census Bureau. In this quarter, precinct demographic data was provided to support the analysis of the Community Relations Survey Report done on behalf of the City of Portland and the COCL/COAB by Davis, Hibbitts & Midghall, Inc.

2016 Q2 Update: PPB continues to collect demographic data pertinent to each precinct. The most recent census data was entered in the demographic tables last quarter so there was nothing further to do with that at this time.

2016 Q3 Update: PPB continues to collect demographic data pertinent to each precinct and provide statistics to support police programs. SSD analyst began developing a demographic dashboard in Tableau to assist PPB staff with identifying areas for outreach (anticipated completion in 2016 Q4).

2016 Q4 Update: PPB continues to collect demographic data pertinent to each precinct. PPB created new summary tables using the recently released 2011-2015 American Community Survey 5-Year Estimates from the Census Bureau. A detailed and an abbreviated version of the tables was completed. An SSD analyst also created a web-based tool for PPB to quickly look up demographics by precinct.

2017 Q1 Update: PPB continues to collect demographic data pertinent to each precinct. In this quarter, an SSD analyst utilized the current demographic tables to support an analysis of traffic and pedestrian stops.

2017 Q2 Update: PPB continues to collect demographic data pertinent to each precinct.

2017 Q3 Update: PPB continues to collect demographic data pertinent to each precinct.

2017 Q4 Update: PPB continues to collect demographic data pertinent to each precinct. PPB created new summary tables using the recently released...
2012-2016 American Community Survey 5-Year Estimates from the Census Bureau. A detailed and an abbreviated version of the tables were completed. The internal web-based demographic lookup tool was also updated with the new data.

2018 Q1 Update: PPB continues to collect demographic data pertinent to each precinct.
2018 Q2 Update: PPB continues to collect demographic data pertinent to each precinct.
2018 Q3 Update: PPB continues to collect demographic data pertinent to each precinct.
2018 Q4 Update: PPB continues to collect demographic data pertinent to each precinct. These are shared with each Precinct Commander to inform the precinct's outreach and engagement activities.

2019 Q1 Update: PPB continues to collect demographic data pertinent to each precinct.
2019 Q2 Update: PPB continues to collect demographic data pertinent to each precinct.
2019 Q3 Update: PPB continues to collect demographic data pertinent to each precinct.
2019 Q4 Update: PPB continues to collect demographic data pertinent to each precinct.

2020 Q1 Update: PPB continues to collect demographic data pertinent to each precinct.
2020 Q2 Update: PPB continues to collect demographic data pertinent to each precinct.
2020 Q3 Update: PPB continues to collect demographic data pertinent to each precinct.
2020 Q4 Update: PPB continues to collect demographic data pertinent to each precinct. PPB created new summary tables using the recently released 2015-2019 American Community Survey 5-Year Estimates from the Census Bureau. Demographics were shared with Precinct commanders and published on PPB’s website.

2021 Q1 Update: PPB continues to collect demographic data pertinent to each precinct.
2021 Q2 Update: PPB continues to collect demographic data pertinent to each precinct.
2021 Q3 Update: PPB continues to collect demographic data pertinent to each precinct.
2021 Q4 Update: PPB continues to collect demographic data pertinent to each precinct.

2022 Q1 Update: PPB continues to collect demographic data pertinent to each precinct.
2022 Q2 Update: PPB continues to collect demographic data pertinent to each precinct.
2022 Q3 Update: PPB continues to collect demographic data pertinent to each precinct.
2022 Q4 Update:
Department of Justice Tasks / Quarterly Update Report

Task Description

Documentation and analysis of demographic data

Task Requirements:

PPB shall continue to require that officers document appropriate demographic data regarding the subjects of police encounters including race, age, sex, and perceived mental health status of the subject and provide such information to the CPRC to contribute to their analysis of community concerns regarding discriminatory policing. In consultation with the COAB and CPRC, PPB shall consider enhancements to its data collections efforts, and report on its efforts to enhance data collection to the DOJ by no later than December 31, 2013, and quarterly thereafter.

Status

Pending Compliance Coordinator review

Action Steps:

1. Ensure PPB policy requires collection of demographic and other data outlined in this provision
2. Demonstrate that PPB is technologically capable of tracking and reporting on stops data
3. Identify opportunities for improvement in data collection
4. Demonstrate communication of data analysis to CPRC for collaborative analysis of stops data that speaks to community concerns

Evidence of Completion:

1. Draft edits to Directive 312.00 - Requests for Assistance and Required Documentation
2. Draft edits to Directive 910.000 - Field Reporting Handbook Instructions
3. 2009 Technical Assistance Report from Portland State University
4. 2013 Report on Stops Data Collection
5. Stops Data screen shot and system (VCAD and Desktop) overview
6. PPB Tips and Techniques for Stops Data Collection

Task Date Completed:

Received DOJ Approval?

Approval

2014 Q1 Update: Data enhancement report completed; stops collection report amended to include perceived mental health status pending RegJIN implementation.

2014 Q2 Update: Stops data report completed for the quarter. Report on data enhancement efforts was written and forwarded to USDOJ.


2014 Q4 Update: Stops data report for the quarter is not yet complete as the Stops data analyst has not yet been hired and other analysts' time is at a premium. However, it is expected shortly. Report on data enhancements achieved this quarter was prepared.

2015 Q1 Update: Stops data report for last quarter was completed by new analyst as was the report for this quarter. Both will be posted to the PPB website with previous quarterly reports.

2015 Q2 Update: The 2nd quarter Stops data report will be posted to the PPB website with the quarterly DOJ report.

2015 Q3 Update: The third quarter Stops data report will be posted to the PPB website along with the quarterly DOJ report.

2015 Q4 Update: The fourth quarter Stops data report will be posted to the PPB website along with the quarterly DOJ report.

2016 Q1 Update: The first quarter Stops data report will be posted to the PPB website along with the quarterly report.

2016 Q2 Update: The second quarter Stops data report will be posted to the PPB website along with the quarterly DOJ report.

2016 Q3 Update: The third quarter Stops data report will be posted to the PPB website along with the quarterly DOJ report.
Department of Justice Tasks / Quarterly Update Report

2016 Q4 Update: The fourth quarter Stops data report will be posted to the PPB website along with the quarterly DOJ report.

2017 Q1 Update: The first quarter Stops data report will be posted to the PPB website along with the quarterly DOJ report.

2017 Q2 Update: The second quarter Stops Data report has been posted to the PPB website.

2017 Q3 Update: The third quarter Stops Data report has been posted to the PPB website.

2017 Q4 Update: The third quarter Stops Data report has been posted to the PPB website.

2018 Q1 Update: The fourth quarter Stops Data report has been posted to the PPB website.

2018 Q2 Update: The 2018 first quarter Stops Data report has been posted to the PPB website.

2018 Q3 Update: The 2018 second quarter Stops Data report has been posted to the PPB website.

2018 Q4 Update: The third quarter Stops Data report has been posted to the PPB website.

2019 Q1 Update: The fourth quarter Stops Data report has been posted to the PPB website.

2019 Q2 Update: The first quarter Stops Data report has been posted to the PPB website.

2019 Q3 Update: The second quarter Stops Data report has been posted to the PPB website.

2019 Q4 Update: The third quarter Stops Data report has been posted to the PPB website.

2020 Q1 Update: The fourth quarter Stops Data report has been posted to the PPB website.

2020 Q2 Update: The first quarter Stops Data report has been posted to the PPB website.

2020 Q3 Update: The second quarter Stops Data report has been posted to the PPB website.

2020 Q4 Update: The third quarter Stops Data report has been posted to the PPB website.

2021 Q1 Update: The fourth quarter Stops Data report has been posted to the PPB website.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Task Description
Metrics development community engagement and outreach

Task Requirements: The COAB, COCL, PPB, and DOJ will jointly develop metrics to evaluate community engagement and outreach.

Status Pending COCL selection

Action Steps:

Evidence of Completion:

Received DOJ Approval? Approval

Status Note:

2014 Q1 Update: PPB awaiting the naming of the COCL and selection of COAB members before pursuing this task.

2014 Q2 Update: PPB awaiting the naming of the COCL and selection of COAB members.

2014 Q3 Update: PPB awaiting the final selection of the COCL and the naming of the COAB members to collaborate on this task.

2014 Q4 Update: Although COCL has been appointed, PPB must still wait for the formation of the COAB in order to develop the metrics for evaluation of community engagement efforts as it is a collaborative process.

2015 Q1 Update: COAB members were named at the end of January and their initial meeting was held on February 9th. The first two monthly meetings were focused on organizational structure. Topics for subcommittees were identified and members were asked to volunteer for the one(s) in which they were interested. The CEO subcommittee met once at end of March to discuss the first of two required town hall meetings on PPB outreach efforts which was scheduled for April 2nd. The group has not yet addressed the development of metrics for evaluation of these efforts.

2015 Q2 Update: Metrics have not yet been developed as the time frames for the work plan for the creation of a CEO Plan have been delayed due to issues with the contract for the required community survey. PPB looks forward to collaborating on this process with the COAB once the prerequisite actions have been taken.

2015 Q3 Update: Although progress is being made with regard to the steps necessary for the development of a CEO Plan, the parties are not at a point where they are ready to discuss metrics by which to assess its success because the plan has yet to be formulated.

2015 Q4 Update: The development of a CEO Plan in conjunction with the COAB is progressing at a slow pace. Thus the parties are still not at a point where they are ready to discuss metrics by which to assess its success because the plan is no where near formulation yet. The COAB’s current CEO workplan does not anticipate completion until early 2017.

2016 Q1 Update: The effort to pursue the development of a CEO Plan collaboratively by PPB and COAB was again hindered by the disruptions and ultimate cancellation of COAB meetings and subcommittees this quarter.

2016 Q2 Update: The COAB’s 60-day hiatus, which extended into the fourth quarter, as well as inclement weather led to the cancellation of some meetings and hindered the development of a CEO Plan by PPB and COAB. Metrics cannot be developed until the Plan has been created.
<table>
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<tr>
<th>Year</th>
<th>Quarter</th>
<th>Update</th>
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</thead>
<tbody>
<tr>
<td>2017</td>
<td>Q1</td>
<td>The COAB was disbanded at its January meeting so no collaborative efforts at creating a CEO Plan were possible this quarter. Obviously, metrics cannot be developed until the Plan is created. The Bureau will continue its own efforts in this regard until such time as a replacement body for the COAB is created.</td>
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<tr>
<td>2017</td>
<td>Q2</td>
<td>The COAB has yet to be replaced so no joint efforts to create a CEO Plan were undertaken this quarter. The existence of a plan is required before metrics can be developed to measure the plan's effectiveness. The Bureau maintained its own internal ongoing daily efforts at community engagement and is tracking those for future use in this regard.</td>
</tr>
<tr>
<td>2017</td>
<td>Q3</td>
<td>The COAB has yet to be replaced so no joint efforts to create a CEO Plan were undertaken this quarter. The existence of a plan is required before metrics can be developed to measure the plan's effectiveness. The Bureau maintained its own internal ongoing efforts at community outreach and engagement and is tracking those for future use in this regard.</td>
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<tr>
<td>2017</td>
<td>Q4</td>
<td>The successor board to the COAB has still not been created so no joint efforts to create a CEO Plan were undertaken this quarter. The existence of a plan is required before metrics can be developed to measure the plan's effectiveness. The Bureau maintained its own internal ongoing efforts at community outreach and engagement and is tracking those for future use in this regard. Major strides were made in the development of an app for officers' use to track on an immediate basis each one's community engagement activities. The app rolled out to the entire Bureau at the end of Q1.</td>
</tr>
<tr>
<td>2018</td>
<td>Q1</td>
<td>The successor board to the COAB has still not been created so no joint efforts to create a CEO Plan were undertaken this quarter. The existence of a plan is required before metrics can be developed to measure the plan's effectiveness. However, the Bureau continues its own internal ongoing efforts at community outreach and engagement and is tracking those for future use in this regard. This quarter, major strides were made in the development of an app for officers' use to track on an immediate basis each one's community engagement activities. The app rolled out to the entire Bureau at the end of Q1.</td>
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<tr>
<td>2018</td>
<td>Q2</td>
<td>The new PCCEP is coming closer to fruition with efforts in recruitment and application occurring this quarter with the assistance of consultants. But obviously no joint efforts to create a CEO plan could be undertaken yet. The plan is a prerequisite to developing metrics for the measurement of outcomes. However, the Bureau's efforts at outreach and engagement are on-going. The new tracking app was fully implemented and showed significant results in the number and types of community events in which police participate.</td>
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<td>2018</td>
<td>Q3</td>
<td>The members of the PCCEP were selected and announced by Mayor Wheeler. They are now going through the on-boarding process. The first public meeting is not scheduled until November 28th so once again, it was not possible to commence the collaborative process of creating a CEO Plan. That is necessary to begin developing metrics for measuring the Plan's effectiveness. However, as usual, the Bureau continued its outreach and engagement efforts with a variety of communities in Portland. The app is a tool that members have available to track their attendance at various events.</td>
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<tr>
<td>2018</td>
<td>Q4</td>
<td>This has been a topic of conversation between the COCL, DOJ, PPB and the City during this quarter now that PCCEP is up and running. COCL took the first stab at proposing metrics to be considered. The parties agreed to meet face to face in January when DOJ is next scheduled to be in town to develop a joint recommendation of metrics for a CEO Plan which will be provided to PCCEP for their review and input.</td>
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<tr>
<td>2019</td>
<td>Q1</td>
<td>DOJ, COCL, the City and PPB met in January to discuss the metrics to be used in assessing the CEO Plan. The group came to consensus on the metrics to propose. Those will be forwarded to the PCCEP when they are ready to address them.</td>
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<tr>
<td>2019</td>
<td>Q2</td>
<td>The metrics developed by DOJ, COCL, the City and PPB were forwarded to PCCEP. The committee voted to approve the metrics at its June meeting.</td>
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<tr>
<td>2019</td>
<td>Q3</td>
<td>The metrics now exist for assessing the CEO Plan in the future. They will be utilized next Fall when PPB reports to PCCEP on its progress towards the goals and action items outlined in the new plan.</td>
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<td>2019</td>
<td>Q4</td>
<td>PCCEP made some recommendations as to the wording of the metrics. Those suggestions are being reviewed and a response is forthcoming.</td>
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<tr>
<td>2020</td>
<td>Q1</td>
<td>The Chief reviewed PCCEP's five recommendations related to the proposed metrics. On March 5, 2020, she signed and forwarded her responses to the PCCEP, accepting some and offering modifications to the others.</td>
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Friday, May 7, 2021
### Department of Justice Tasks / Quarterly Update Report

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<th>Year</th>
<th>Quarter</th>
<th>Update</th>
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<tbody>
<tr>
<td>2020</td>
<td>Q2</td>
<td>No further action was taken regarding the metrics this quarter.</td>
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<tr>
<td>2020</td>
<td>Q3</td>
<td>No further action was taken regarding the metrics this quarter.</td>
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<tr>
<td>2020</td>
<td>Q4</td>
<td>No further action was taken regarding the metrics this quarter.</td>
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<td>2021</td>
<td>Q1</td>
<td>No further action was taken regarding the metrics this quarter as the issue has not come up on PCCEP's agenda.</td>
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<tr>
<td>2021</td>
<td>Q2</td>
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<td>2021</td>
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<td>2022</td>
<td>Q4</td>
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Task Description
PPB Annual Report

Task Requirements: Annually, PPB shall issue a publicly available PPB Annual Report, which shall include a summary of its problem-solving and community policing activities. A draft of the Annual Report shall be reviewed by the COAB before the report is finalized and released to the public. Once released, PPB shall hold at least one meeting in each precinct area and at a City Council meeting annually to present its Annual Report and to educate the community about its efforts in community policing in regard to the use of force, and about PPB’s policies and laws governing pedestrian stops, stops and detentions, and biased-free policing, including a civilian’s responsibilities and freedoms in such encounters.

Status: Actively in Process

Action Steps:
1. PPB will begin preliminary work to identify community policing activities and engagement
2. PPB will work with stakeholders, the community, City Council, and DOJ to identify required and desired elements of an annual report on problem-solving and community policing activities
3. PPB will explore ways to compile its Stops Data Collection Report with other existing data sets and reports to establish a more comprehensive Annual Report

Task Date Completed: Received DOJ Approval?

Evidence of Completion:
1. 2013 Stops Data Collection Report (located in folder #148)
2. Community surveys from PSU and University of Illinois, Chicago (located in folder #146 a.)

Status Note:

2014 Q1 Update: While awaiting the approval of the Agreement and the creation of the COAB, the PPB issued its own public DOJ progress report outlining its accomplishments thus far.

2014 Q2 Update: Nothing due this quarter.

2014 Q3 Update: This report was not due this quarter.

2014 Q4 Update: This report was not due this quarter.

2015 Q1 Update: The required summary of PPB's problem-solving and community policing activities will be a section included within the Bureau's regularly issued annual report that should be published in June.

2015 Q2 Update: The PPB's annual DOJ progress report will be done on a calendar year basis so 2015 should be out in January, 2016.

2015 Q3 Update: The annual report was not due this quarter.

2015 Q4 Update: The annual report was not due this quarter. It will be issued in the first quarter of 2016.

2016 Q1 Update: PPB’s DOJ annual compliance narrative was written and submitted to the COAB for review on March 10, 2016. It was discussed at the March 24, 2016 COAB general meeting. A comment period ensued. It will be now be issued with graphics in a booklet format. The required precinct and City Council meetings following publication will be scheduled in the next quarter.

2016 Q2 Update: The annual report was completed. The Commanders of each precinct decided to schedule their community meetings to discuss their efforts in early August given differing demands.

2016 Q3 Update: Each PPB precinct Commander held a community meeting during the first two weeks of August to discuss the annual report and the progress the Bureau has made towards compliance. Attendees were encouraged to share any other questions/issues/concerns they might have and some very meaningful dialogues resulted.

2016 Q4 Update: The annual report was not due this quarter.

2017 Q1 Update: The annual report was not due this quarter.

2017 Q2 Update: The PPB’s DOJ annual compliance narrative will now be included in the Bureau's overall annual report based on feedback.

Friday, May 7, 2021
2017 Q3 Update: PPB is currently collecting information and statistics from all Divisions for its comprehensive annual report. It will include a section on the Bureau's progress towards compliance with the DOJ Settlement Agreement.

2017 Q4 Update: Due to other more critical demands, the publication of the Bureau's annual report has been delayed. However, when it is complete, it will include a section on the Bureau's progress towards compliance.

2018 Q1 Update: The publication of the Bureau's annual report continues to be delayed. However, when it is complete, it will include a section on the Bureau's progress towards compliance.

2018 Q2 Update: PPB completed its 2015-16 annual report and will issue its 2017 annual report in the Fall. In both, information regarding compliance efforts was incorporated into the overall report with each relevant RU citing its accomplishments towards that goal.

2018 Q3 Update: The 2017 Annual Report has been prepared and will be forwarded to the PCCEP members for comment prior to publication pursuant to the terms of the Agreement. Given the PCCEP's schedule, it should be posted by end of 4th quarter.

2018 Q4 Update: The PCCEP members were given an opportunity to review and comment on the Bureau's 2017 Annual Report. The Bureau received feedback from several members in the second week of December. Given the timing and need to issue this overdue report, PPB was unable to make the changes they suggested. However, the Bureau will address those in the 2018 annual report as the Bureau looks to produce a more timely and comprehensive report of its challenges as well as its achievements.

2019 Q1 Update: In January, the Bureau began the process of gathering the necessary information from all RUs for the 2018 Annual report. It established internal time lines so that the report will be published in a more timely fashion this year, as recommended by the PCCEP. The goal is to have a draft for PCCEP by late Spring-early Summer.

2019 Q2 Update: The Bureau completed the drafting of its 2018 Annual Report and provided it to PCCEP at the end of June per one of PCCEP's previous recommendations. A number of its additional recommendations from the 2017 report were incorporated into the 2018 report.

2019 Q3 Update: The PCCEP Steering committee and Settlement Agreement subcommittee reviewed the Annual Report at their meetings in early July. The Steering Co-Chairs then placed it on the agenda for the July monthly public PCCEP meeting for comment and consideration of recommendations.

2019 Q4 Update: On October 2, 2019, Chief Outlaw presented the Bureau's 2018 Annual Report to City Council. Council members voted to approve it.

2020 Q1 Update: In January, the Bureau again began collecting the information from all RUs for the 2019 Annual Report. The requested structure and timeframes for the report were shared with members. However, one of the possible consequences of the COVID 19 situation is that the report will not be published as early as it was last year.

2020 Q2 Update: Due to COVID19 and the consequence of staff telecommuting as well as the onset of serious civil unrest at the end of May that has sucked many resources away from regular duties, the Annual Report has not been completed. It will likely be Fall before attention can return to this endeavor as it is a huge undertaking.

2020 Q3 Update: Work resumed on the significant task of creating the PPB's 2019 annual report. A draft of the verbage was nearly completed and layout was initiated. PPB expects to have a draft for PCCEP's review in early October, barring unforeseen circumstances.

2020 Q4 Update: PPB finally finished the draft of its 2019 Annual report which was sent to PCCEP at the end of October. It was an agenda item at a subcommittee's meeting in November. The Bureau considered the feedback it received and determined that most of those
The Chief then appeared before the City Council as required to present the report on December 16, 2020. Central Precinct then scheduled its Zoom Precinct meeting on the report on December 29. That information was placed on the Bureau’s website as well as on its Facebook page. In addition, Central Precinct invited individuals and representatives of neighborhood and business associations that they meet with on a regular basis. The same was true of North Precinct who held theirs on December 28th.

Unfortunately, due to staffing issues related to COVID illness, East Precinct was unable to schedule its Precinct meeting before the end of the year.

2021 Q1 Update: PPB worked on the draft of the 2020 Annual Report throughout the first quarter and provided that to the CHO in early April. The plan is to finalize it by May and share it with PCCEP. Once they have reviewed and commented, PPB will seek a date for the Chief to present to Council and then set the required Precinct meetings. The goal is to complete all steps by the end of the summer.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q4 Update:
Department of Justice Tasks / Quarterly Update Report

Task Description
COAB Recommendations

Task Requirements:  The COAB may make recommendation approved by a majority of its membership regarding implementation of the items in the Agreement.

Status        Pending COCL selection
Action Steps:

Task Date Completed:  

Evidence of Completion:  

Received DOJ Approval?  Approval

Status Note:
2014 Q1 Update:  COAB task when selected.
2014 Q2 Update:  
2014 Q3 Update:  
2014 Q4 Update:  
2015 Q1 Update:  
2015 Q2 Update:  
2015 Q3 Update:  
2015 Q4 Update:  
2016 Q1 Update:  
2016 Q2 Update:  
2016 Q3 Update:  
2016 Q4 Update:  
2017 Q1 Update:  
2017 Q2 Update:  
2017 Q3 Update:  
2017 Q4 Update:  
2018 Q1 Update:  
2018 Q2 Update:  
2018 Q3 Update:  Will now be the PCCEP's task.
2018 Q4 Update:  
2019 Q1 Update:  
2019 Q2 Update:  
2019 Q3 Update:  
2019 Q4 Update:  
2020 Q1 Update:  
2020 Q2 Update:  

Friday, May 7, 2021
Department of Justice Tasks / Quarterly Update Report

Task Description

Twice yearly meeting requirement for COAB and other interest groups

Task Requirements:
The COAB shall meet at least twice per year with the Chief, the Police Commissioner, PPB Precinct Commanders, PPB Neighborhood Response Teams, and a representative of the Office of Neighborhood Involvement Crime Prevention to assess and solicit comment on PPB’s activities in regards to community outreach, engagement, and problem-solving policing. The COAB shall also provide the opportunity for public comment at each of its meetings to keep open lines of communication with the public-at-large.

Status
Pending COCL selection

Action Steps:

Evidence of Completion:

Task Date Completed:

Received DOJ Approval?

Approval

Status Note:

2015 Q4 Update: The date for the first of these meetings has yet to be set. The identified actions that need to be undertaken before it would be beneficial and productive to conduct these meetings have not been completed. However, one of the prerequisite informational meetings on current PPB outreach activities was held in November. A follow up to that is planned for the next quarter. The parties will then schedule the first of these meetings with the Chief and Mayor, hopefully before summer.

2016 Q1 Update: Now that a number of the prerequisite activities have occurred including the community survey and presentations on PPB engagement activities to the COAB, a date for the first of these meetings has been set. Due to calendaring issues for both the Chief and Mayor, the first available COAB meeting date was May 26, 2016.

2016 Q2 Update: Unfortunately, due to issues with the COAB itself and the disruptions at its meetings which created an unsafe environment, the May meeting which the Chief and Mayor were prepared to attend was cancelled. PPB awaits the rescheduling of this event.

2016 Q3 Update: Problems continued with the conduct of COAB meetings as there was so much civil unrest that meetings were cut short or cancelled. Ultimately, in August the COAB meetings were suspended for 60 days so the Chief and Mayor’s appearance were not rescheduled this quarter. Both continue to await an invitation to attend when the agenda allows.

2016 Q4 Update: The COAB’s 60-day hiatus extended into Q4. The Chief and Mayor’s appearance before COAB was not rescheduled this quarter. They await an invitation to attend.

2017 Q1 Update: The COAB was discontinued by Portland Mayor Ted Wheeler at its January meeting. Thus the Chief could not meet with the Board.
2017 Q2 Update: The COAB no longer exists and its successor board has yet to be created so the Chief could not meet with the Board.

2017 Q3 Update: The successor board to COAB has not been developed yet so the Chief obviously could not meet this requirement.

2017 Q4 Update: The successor board to the COAB has not been created yet so the new Chief obviously could not meet this requirement.

2018 Q1 Update: Although progress has been made in the planning and activity necessary to move this project forward, the successor board to the COAB has not been formed yet so the new Chief obviously could not meet this requirement. However, the Mayor has begun to hold monthly community forums on the progress of the Settlement Agreement and other public safety issues until the new members of the PCCEP are appointed and committee meetings commence. The agenda for the first one was an update on where the City stood in light of the Agreement. Chief Outlaw attended and discussed PPB's role and status as well as listened to the community's comments and concerns.

2018 Q2 Update: Progress continues in the application process for membership on the successor board to the COAB but has not been completed so the Chief obviously could not meet this requirement. However, the Mayor's office has maintained the monthly community forums this quarter on the progress of the Settlement Agreement and other public safety issues. The agenda for the April one focused on the mental health system; May was organized as a listening session for community to ask City questions and offer comments and the June forum consisted of two panels who addressed how law enforcement interacts with vulnerable populations. Command members and other Bureau staff attended and participated in each of the forums.

2018 Q3 Update: The Mayor has named the members of the newly created PCCEP. However, the first public meeting is not scheduled until the end of November, thus the Chief could not meet this requirement. Upon organizing and creating a work plan, the PCCEP is expected to consult the Chief and Mayor to determine when to schedule these meetings.

2018 Q4 Update: PCCEP held its first public meeting on November 28, 2018 and its second on December 17th. The first two meetings focused on creating its organizational structure and receiving some additional training. The Steering Committee needs to decide at which future meeting this requirement will be included as an agenda item. The Chief remains willing and anxious to meet with the PCCEP.

2019 Q1 Update: PCCEP held public meetings in each of the three months of this quarter. At the March meeting, Chief Outlaw addressed the members on the topic of Community Engagement. Officer Natasha Haunsperger of the Community Engagement Unit supplemented the Chief's talk with a Power Point presentation on the Bureau's efforts in this regard, sharing data garnered from PPB's CE app.

2019 Q2 Update: The Chief was not scheduled to meet with the PCCEP this quarter.

2019 Q3 Update: The Chief was not asked to meet with PCCEP this quarter. However, it should be noted that at least two PPB Command personnel, one of which is an Assistant Chief, attend each monthly PCCEP meeting.

2019 Q4 Update: The Chief was not asked to meet with PCCEP this quarter. However, it should be noted that at least two PPB Command personnel, one of which is an Assistant Chief, attend each monthly PCCEP meeting.

2020 Q1 Update: The Chief was not asked to meet with PCCEP this quarter. However, it should be noted that at least two PPB Command personnel, one of which is an Assistant Chief, attend each monthly PCCEP meeting.

2020 Q2 Update: The newly appointed Chief, Chuck Lovell, was introduced and gave some remarks at the June PCCEP monthly meeting. Also in attendance were a Commander and other PPB personnel.

2020 Q3 Update: The Chief was not asked to attend any monthly PCCEP meeting this quarter. However, it should be noted that at least two PPB Command personnel, one of which is an Assistant Chief, attend each monthly PCCEP meeting. Further, the Chief and Mayor are now meeting with the Chairs of PCCEP as well as TAC and CRC every few weeks to discuss issues of concern.

2020 Q4 Update: The Chief was not asked to attend any monthly PCCEP meeting this quarter.
However, it should be noted that at least two PPB Command personnel, one of which is an Assistant Chief, attend each monthly PCCEP meeting.
Further, the Chief and Mayor are now meeting with the Chairs of PCCEP as well as TAC and CRC every few weeks to discuss issues of concern.

2021 Q1 Update: The Chief was not asked to attend any monthly PCCEP meeting this quarter. However, it should be noted that at least two PPB Command personnel, one of which is an Assistant Chief, attend each monthly PCCEP meeting. Additionally, the Chief and Mayor continue to meet with the Chairs of PCCEP as well as TAC and CRC every few weeks to discuss issues of concern.

2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:

2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
Meeting invitation to US Attorney's Office

**Task Requirements:** A representative of the Oregon U.S. Attorney's Office shall be invited to attend all COAB meetings.

**Status:** Pending COCL selection

**Action Steps:**

**Task Date Completed:**

**Evidence of Completion:**

**Status Note:**

2014 Q1 Update: COCL/COAB's responsibility once named and functioning.

2014 Q2 Update:

2014 Q3 Update:

2014 Q4 Update:

2015 Q1 Update:

2015 Q2 Update:

2015 Q3 Update:

2015 Q4 Update:

2016 Q1 Update:

2016 Q2 Update:

2016 Q3 Update:

2016 Q4 Update:

2017 Q1 Update:

2017 Q2 Update:

2017 Q3 Update:

2017 Q4 Update:

2018 Q1 Update: Now the PCCEP's responsibility as its first public meeting took place on November 28, 2018.

2018 Q2 Update:

2018 Q3 Update:

2018 Q4 Update:

2019 Q1 Update:

2019 Q2 Update:

2019 Q3 Update:

2019 Q4 Update:

2020 Q1 Update:

2020 Q2 Update:

2020 Q3 Update:

Friday, May 7, 2021
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COAB Meeting Requirements

**Task Requirements:** COAB shall meet as needed to accomplish their objectives as set forth in this Agreement. All COAB meetings shall be open to the public. In addition, COAB shall attend quarterly meetings with the COCL as provided in paragraph 163. To the extent that COAB meetings are subject to the Oregon Public Meetings Law, or similar regulatory or statutory requirements, the City shall be responsible to give advice necessary to the COCL to ensure compliance with those laws and agrees to represent COCL in any challenges regarding compliance with those laws.

**Status**  
Pending COCL selection

**Action Steps:**

**Task Date Completed:**

**Evidence of Completion:**

**Status Note:**

2014 Q1 Update: COAB responsibility

2014 Q2 Update:

2014 Q3 Update:

2014 Q4 Update:

2015 Q1 Update:

2015 Q2 Update:

2015 Q3 Update:

2015 Q4 Update:

2016 Q1 Update:

2016 Q2 Update:

2016 Q3 Update:

2016 Q4 Update:

2017 Q1 Update:

2017 Q2 Update:

2017 Q3 Update:

2017 Q4 Update:

2018 Q1 Update:

2018 Q2 Update:

2018 Q3 Update: This is now PCCEP's responsibility.

2018 Q4 Update:

2019 Q1 Update:

2019 Q2 Update:

2019 Q3 Update:

2019 Q4 Update:

**Received DOJ Approval?**

Approval
Department of Justice Tasks / Quarterly Update Report

2020 Q1 Update:
2020 Q2 Update:
2020 Q3 Update:
2020 Q4 Update:

2021 Q1 Update:
2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:

2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:

Friday, May 7, 2021
## Department of Justice Tasks / Quarterly Update Report

### Task Description
COAB member training

### Task Requirements:
The City shall provide COAB members with appropriate training necessary to comply with requirements of City and State law.

### Status
Pending COCL selection

### Action Steps:

### Task Date Completed:

### Received DOJ Approval?

### Approval

### Evidence of Completion:

### Status Note:

#### 2014 Q1 Update:
City's responsibility.

#### 2014 Q2 Update:

#### 2014 Q3 Update:

#### 2014 Q4 Update:

#### 2015 Q1 Update:
PPB was prepared to participate in the training for COAB members scheduled for February 2, 2015. However, the Board ran out of time for the whole presentation due to a lengthy agenda. PPB remains willing to assist in COAB basic training when appropriate and requested.

#### 2015 Q2 Update:
PPB was asked to conduct a Training 101 presentation to the COAB at its June 11th meeting. Capt. Marshman presented an overview and then Capt. Parman and his staff provided more detailed information to the group. PPB, and in particular the Training Division, prepared a Citizens Academy to be given to all COAB members on one of three date sets of their choosing. The first took place on June 30.

#### 2015 Q3 Update:
PPB was prepared to make a presentation on BHU to the September full COAB meeting but it was postponed to another month. PPB members of the COAB continue to provide "training" on the workings of the PPB at subcommittee meetings. The Accountability subcommittee has expressed an interest in hearing from PPB's EIS administrator as well as the Captain of the Professional Services Division in the near future before reviewing relevant directives. In addition, the COCL has indicated that more informational presentations, including one on community engagement efforts, will be requested for upcoming full COAB meetings.

PPB remains committed to cooperating in this way to enhance the knowledge base of the members so they can make informed recommendations.

#### 2015 Q4 Update:
The BHU finally made its presentation to the COAB this quarter as did Commander Uehara and other officers on PPB's current Community Engagement efforts.

PPB members on the COAB remain willing and able to provide "training" or arrange trainings on any aspect of the Bureau at the various subcommittee meetings or at full committee meetings. To that end, the EIS Administrator and his Lieutenant made a presentation about that piece of PPB's accountability system to the Accountability subcommittee this quarter.

#### 2016 Q1 Update:
In this quarter, PPB presented on its annual compliance report at the March 24th meeting.

PPB members on the COAB remain willing and able to provide "training" or arrange trainings on any aspect of the Bureau at the various subcommittee meetings or at full committee meetings. To that end, the Training Captain met with the Use of Force subcommittee to discuss access to training materials this quarter. Additionally, Officer Bruner-Dehnart and Dr. Liesbeth Gerritson made a presentation on CIT/ECIT training to the Mental Health subcommittee in February.

#### 2016 Q2 Update:
PPB members on the COAB remain willing and able to provide "training" or arrange trainings on any aspect of the Bureau at the various subcommittee meetings or at full committee meetings. However, this quarter, no requests for Training from PPB was requested.

#### 2016 Q3 Update:
PPB members on the COAB remain willing and able to provide "training" or arrange trainings on any aspect of the Bureau at the
various subcommittee meetings or at full committee meetings. However, this quarter the COAB was plagued with disruptions that caused meetings to be terminated early or cancelled altogether. This culminated in the suspension of COAB activities for a 60 day hiatus beginning in August to explore options for the re-design of the COAB’s scope and mission to achieve a more functional body.

2016 Q4 Update: PPB members on the COAB remained willing and able to provide "training" or arrange trainings on any aspect of the Bureau at the various subcommittee meetings or at full committee meetings. Given COAB's 60-day hiatus that extended into Q4, as well as the anticipated re-design of the COAB, no trainings were requested.

2017 Q1 Update: The COAB was discontinued by Mayor Ted Wheeler in January so the Bureau had no opportunity to provide training to members.

2017 Q2 Update: The COAB has yet to be replaced so no training of members was possible.

2017 Q3 Update: The successor board to the COAB has not been formulated yet so no training of members was possible.

2017 Q4 Update: The successor board to the COAB has not been formulated yet so no training of members was possible.

2018 Q1 Update: The successor board to the COAB has not been formulated yet so no training of members was possible.

2018 Q2 Update: The members to the successor board to the COAB, currently referred to as PCCEP, have not been selected by the Mayor yet so no training of members was possible.

2018 Q3 Update: The Mayor announced the names of the individuals selected to serve on the newly formed Portland Committee on Community Engaged Policing (PCCEP) on September 18. The City, in collaboration with the facilitators hired for this purpose, has developed an on-boarding plan for the group which includes two weekend retreats as well as other training opportunities, including attendance at a PPB Community training academy and a ride-along with a PPB officer.

To that end, PPB has set up a full day community academy for the members which will occur in early October as well as arranged for ride-alongs for all the members and alternates as that is a requirement under the Agreement. Further, some PPB members have been asked to make presentations regarding the Bureau's organization and operations at one of the PCCEP training days.

2018 Q4 Update: On September 29, Assistant Chief Chris Davis and a member of the Compliance team attended PCCEP’s retreat to train members on the organization of the Bureau as well as to discuss other topics identified by the facilitator including BHU, Policy development, community engagement, advisory bodies, etc. Assistant Chief Davis then answered questions of the members. PPB arranged for two community academies to be held for the benefit of PCCEP members, one all day Saturday, October 6th and the other on two consecutive Wednesday evenings, October 4th and 11th. Most all PCCEP members availed themselves of the opportunity.

2019 Q1 Update: PPB remained ready and willing to provide any training which the PCCEP might request or require about the Bureau. At the March PCCEP general meeting, Chief Outlaw and Officer Natasha Haunsperger conducted a presentation and Powerpoint on Community Engagement and the Bureau's current efforts in that regard.

2019 Q2 Update: PPB remains ready and willing to provide any training which the PCCEP might request or require about the Bureau.

2019 Q3 Update: PPB remains ready and willing to provide training to the PCCEP on any Bureau issues they would like to address. To that end, the BHU Lt and SCT manager made a presentation to the Subcommittee for People with Mental Illness on July 25, 2019 and provided brochures on BHU and the Housing Rapid Response program.

Further, The Race, Ethnicity, Other subcommittee reached out to the AC of Investigations, as well as some GVRT officers to plan a presentation for a community listening session on that Unit in early October.

2019 Q4 Update: PPB remains ready and willing to provide any training which the PCCEP might request or require about the Bureau. The PCCEP subcommittee on Race and Equity asked that AC Shearer and the GVRT give a presentation on the work of that Unit and what the change of name of unit involved. They did so on October 3, 2019.

2020 Q1 Update: PPB remains ready and willing to provide any training which the PCCEP might request or require about the Bureau. A representative from PPB attends all PCCEP subcommittee meetings and at least one Assistant Chief as well as a Commander and other staff attend PCCEP monthly meetings.
A PPB representative now reports at each monthly meeting on the status of any outstanding PCCEP recommendations that the Chief is considering. Such a report was done at the February meeting. The March meeting was cancelled due to the COVID-19 virus. But the practice will resume with the upcoming video meetings.

**2020 Q2 Update:** PPB remains ready and willing to provide any training which the PCCEP might request or require about the Bureau. A representative from PPB attends all PCCEP subcommittee meetings and at least one Assistant Chief as well as a Commander and other staff attend PCCEP monthly meetings.

A PPB representative continues to make a brief report at each monthly meeting at the request of the Steering subcommittee, which may include the status of any outstanding PCCEP recommendations that the Chief is considering.

The BHU Lt was asked to present about that Unit at the June BH subcommittee meeting but due to the protests, that appearance was rescheduled to the July meeting.

**2020 Q3 Update:** As always, PPB remains ready and willing to provide any training which the PCCEP might request or require about the Bureau. A representative from PPB attends all PCCEP subcommittee meetings and at least one Assistant Chief as well as a Commander and other staff attend PCCEP monthly meetings.

A PPB representative continues to make a brief report at each monthly meeting at the request of the Steering subcommittee, which may include the status of any outstanding PCCEP recommendations that the Chief is considering.

The DOJ Compliance team made a presentation about the overall organization of the Bureau as well as the structure created to respond to the requirements of the Settlement Agreement at the training provided to new PCCEP members.

The BHU Lt attended the September BH subcommittee meeting to explain the operations of that Unit and provide relevant data for the members' information.

Representatives from PPB's Equity and Inclusion Office regularly attend the Racial and Equity subcommittee to provide information and feedback.

**2020 Q4 Update:** As always, PPB remains ready and willing to provide any training which the PCCEP might request or require about the Bureau. A representative from PPB attends all PCCEP subcommittee meetings and at least one Assistant Chief as well as a Commander and other staff attend PCCEP monthly meetings.

An Assistant Chief presented a brief status report at each of the monthly general PCCEP meetings this quarter.

Members of the BHU including the Lt. and one of the co-responder teams presented on the work of BHRTs at the December meeting of the PCCEP BH subcommittee.

The Director of the PPB's Policy team attended the Policy and Settlement Agreement subcommittee meeting in November to inform the members of the Bureau's policy and procedure for directives' review and revisions. They also discussed how the subcommittee and PPB could work together to assure that PCCEP had an opportunity to provide input and feedback on directives of interest to them.

Representatives from PPB's Equity and Inclusion Office regularly attend the Racial and Equity subcommittee to provide information and feedback.

**2021 Q1 Update:** PPB remains ready and willing to provide any training which the PCCEP might request or require about the Bureau. A representative from PPB attends all PCCEP subcommittee meetings and at least one Assistant Chief as well as a Commander and other staff attend PCCEP monthly meetings.

An Assistant Chief presented a brief status report at each of the monthly general PCCEP meetings this quarter.

Members of the BHU including the Lt. and one of the co-responder teams presented at the meeting of the PCCEP BH subcommittee in February.
The Director of the PPB’s Policy team attended the February 10th meeting of the Settlement Agreement and Policy subcommittee meeting to review the directives process. She also attended the Youth subcommittee meeting in March to discuss a recommendation they were considering forwarding to the Bureau. They also discussed how the subcommittee and PPB could work together to assure that PCCEP had an opportunity to provide input and feedback on other directives of interest to youth, in particular.

Representatives from PPB’s Equity and Inclusion Office gave a presentation to the Racial and Equity subcommittee at their March meeting and are regular attendees at the monthly meetings.
**Task Description**

Reporting requirements

**Task Requirements:** All PPB audits and reports related to the implementation of this Agreement shall be made publicly available via website and at PPB, IPR, City Hall, and other public locations. Audits and reports shall be posted on PPB’s website.

**Status** Actively in Process

**Action Steps:**

1. Identify any new audit or report resulting from the implementation of the Agreement
2. Ensure that all new audits and reports identified are made publicly available for review and comment per the requirements of this provision

**Task Date Completed:**

**Evidence of Completion:** 1. DOJ Tab on PPB website www.portlandoregon.gov/police/doj

**Status Note:**

2014 Q1 Update: PPB issued its public DOJ Progress Report outlining accomplishments thus far. It was posted on Web and hard copies were provided to IPR, Auditor, Mayor and all City Commissioners, City Attorney, DOJ and other partners for wide distribution.

2014 Q2 Update: PPB posted its force data reports for the quarter on its website. PPB is awaiting the signing of the Agreement and discussions with COCL and DOJ re: format of quarterly reports before posting those to the website.

2014 Q3 Update: PPB will post its force data reports for the third quarter on the website as soon as the data collection and analysis is complete. Still awaiting the COCL selection for discussion with DOJ re: format of quarterly compliance report to post.

2014 Q4 Update: PPB will post its force data reports for the fourth quarter on the website very shortly after submission of this report. The PPB quarterly report to DOJ and the COCL will be posted as well as soon as the parties agree on the format.

2015 Q1 Update: The Bureau's 4th quarter force report was posted on the PPB website as was the PPB's DOJ 4th Quarter Progress report. Due to the upcoming Go Live date for PPB's new records management system and the actions necessary for that implementation, the 1st Quarter Force report will be delayed as all the information for the time frame is not readily available to the Inspector or analyst.

2015 Q2 Update: PPB posted its 1st Quarter force reports and its DOJ 1st Quarter Progress report as required by May 15th. With the hiring of a Stops Data analyst, PPB was able complete its 4th quarter Stops data report and put that on its website as well. The 1st quarter Stops report will be available with the rest of the Bureau's DOJ-related quarterly reports.

2015 Q3 Update: PPB posted its 2nd quarter DOJ report as required on August 14th. The Bureau's 2nd quarter stops report was placed on the web as well. The force report for last quarter has not yet been posted as an expanded format and content has been recommended by the COCL and PPB is awaiting COCL's final approval of that document. It is anticipated that once the parties agree on a final version, future quarterly reports will be posted in a timely fashion.

2015 Q4 Update: PPB posted its 3rd quarter DOJ report in November as required. The Bureau's 3rd quarter Stops report and its new Force report was placed on the web as well.

2016 Q1 Update: PPB posted its 4th quarter DOJ compliance report in February as required. The Bureau's 4th quarter Stops report and the Force report were placed on the web as well.

2016 Q2 Update: PPB posted its 2016 1st Quarter report on its website www.portlandpolice.com on May 15 as required. The Bureau's 1st quarter report Stops report as well as the quarterly Force report were placed there also.

2016 Q3 Update: PPB posted its 2016 2nd Quarter report on its website www.portlandpolice.com on August 15 as required. The Bureau's 2nd quarter Stops report as well as the quarterly Force report were placed there also.

2016 Q4 Update: PPB posted its 2016 3rd Quarter report on its website www.portlandpolice.com as required. The Bureau's 3rd quarter Stops report as well as the quarterly Force report were placed there also.

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Friday, May 7, 2021
Department of Justice Tasks / Quarterly Update Report

2017 Q1 Update: PPB posted its 2016 4th Quarter report on its website www.portlandpolice.com as required. The Bureau's 4th Quarter Stops report as well as the Quarterly Force report were placed there as well.

2017 Q2 Update: PPB posted its 2017 1st quarter report on its website as required. The Bureau's 1st Quarter Stops report as well as the quarterly force report were placed there as well.

2017 Q3 Update: PPB posted its 2017 2nd quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2017 Q4 Update: PPB posted its 2017 3rd quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2018 Q1 Update: PPB posted its 2017 4th quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2018 Q2 Update: The Bureau's 1st quarter compliance report was posted on its website as required. PPB's quarterly Stops report and the quarterly force report were posted as well.

2018 Q3 Update: The Bureau posted its 2nd quarter compliance report on its website as required. PPB's quarterly Stops report and the quarterly Force report were posted as well.

2018 Q4 Update: PPB posted its 3rd quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2019 Q1 Update: PPB posted its 4th quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2019 Q2 Update: PPB posted its 1st quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2019 Q3 Update: PPB posted its 2nd quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2019 Q4 Update: PPB posted its 3rd quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2020 Q1 Update: PPB posted its 4th quarter compliance report on its website as required. The Bureau's quarterly Stops report and the quarterly Force report were posted as well.

2020 Q2 Update: PPB's 1st quarter compliance report was posted on its website as required. Its quarterly Stops report and the quarterly Force report were posted as well.

2020 Q3 Update: PPB posted its 2nd quarter compliance report on its website as required. Its quarterly Stops report and the quarterly Force report were posted as well.

2020 Q4 Update: PPB posted its 3rd quarter compliance report on its website as required. Its quarterly Stops report and the quarterly Force report were posted as well.

2021 Q1 Update: PPB posted its 4th quarter compliance report on its website as required. Its quarterly Stops report and the quarterly Force report were posted as well.

Friday, May 7, 2021
Department of Justice Tasks / Quarterly Update Report

Task Description
DOJ compliance records and retention

Task Requirements: PPB shall collect and maintain all data and records necessary to facilitate and ensure transparency and wide public access to information related to PPB decision making and activities, and compliance with this Agreement, in accordance with the Oregon Public Records Law.

Status Actively in Process

Action Steps:
1. Review directives associated with public records retention and access to ensure they comply with the requirements of this provision.

Task Date Completed: □ Received DOJ Approval? Approval

Evidence of Completion: 1. Draft DIR 614.50: Release of Information

Status Note:
2014 Q1 Update: PPB continued to maintain its data and records this quarter as required by the Oregon Public Records Law.
2014 Q2 Update: PPB continued to maintain its data and records this quarter as required by the Oregon Public Records Law.
2014 Q3 Update: PPB continued to maintain its data and records this quarter as required by the Oregon Public Records Law.
2014 Q4 Update: PPB continued to maintain its data and records this quarter as required by the Oregon Public Records Law.
2015 Q1 Update: PPB continued to maintain data and records this quarter as required by the Oregon Public Records Law.
2015 Q2 Update: PPB maintained the requisite data and records related to the Agreement as required by the Oregon Public Records Law.
2015 Q3 Update: PPB continued to maintain its data and records to the best of its ability as required by the Oregon Public Records Law.
2015 Q4 Update: PPB continued to maintain its data and records to the best of its ability as required by the Oregon Public Records Law.
2016 Q1 Update: PPB continued to maintain its data and records to the best of its ability as required by the Oregon Public Records Law.
2016 Q2 Update: PPB continued to maintain its data and records to the best of its ability as required by the Oregon Public Records Law.
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2019 Q3 Update: PPB continued to maintain its data and records to the best of its ability as required by the Oregon Public Records Law.
2019 Q4 Update: PPB continued to maintain its data and records to the best of its ability as required by the Oregon Public Records Law.
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Department of Justice Tasks / Quarterly Update Report

Task Description

Compliance Officer/Community Liaison

Task Requirements: The City shall publicly identify three potential candidates with expertise in police practices, community engagement, and crisis intervention methods, to serve as a Compliance Officer and Community Liaison (COCL). Following a 30-day public comment period, the City Council shall select a COCL who shall be responsible for synthesizing data related to PPB’s use of force, reporting to the City Council, DOJ, and the public and gathering input from the public related to PPB’s compliance with the Agreement. The COCL shall not be attached to any one City office, shall be wholly independent of PPB, and shall be responsive to the entire City Council, the public, and DOJ. The City shall provide administrative support so that the COCL can perform the duties and responsibilities identified in the Agreement.

Status: Actively in Process

Action Steps: 1. City Council DOJ coordination team, led by Commissioner Amanda Fritz and Mayor Charlie Hales, will outline proposed steps for recruitment.

Task Date Completed: Received DOJ Approval? Approval

Evidence of Completion:

Status Note:

2014 Q1 Update: PPB's Compliance team continued to attend all meetings scheduled to discuss and provide input into the COCL selection process.

2014 Q2 Update: PPB's Compliance team attended the meetings scheduled to work on the selection process.

2014 Q3 Update: The Bureau's Compliance team continued to participate in any scheduled planning meetings and attended the full day public interview session for the three named finalists.

2014 Q4 Update: The COCL selection was announced by the Mayor and City Council on November 12, 2014.


2015 Q2 Update: The COCL team, with its newest member Kathleen Saadat, continued in its work.

2015 Q3 Update: The COCL team continues its work as outlined in the Agreement.

2015 Q4 Update: The COCL team continues its work on parts of the Agreement.

2016 Q1 Update: The COCL team continues its work on parts of the Agreement.

2016 Q2 Update: The COCL team continues its work on parts of the Agreement.

2016 Q3 Update: The COCL team continues its work on parts of the Agreement.

2016 Q4 Update: The COCL team continues its work on parts of the Agreement.

2017 Q1 Update: The COCL team continues its work on parts of the Agreement.

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2017 Q4 Update: The COCL team continues its work on parts of the Agreement.

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2018 Q3 Update: The COCL team continues its work on parts of the Agreement.

2018 Q4 Update: The COCL team continues its work on parts of the Agreement.

2019 Q1 Update: The COCL team continues its work on parts of the Agreement.
Department of Justice Tasks / Quarterly Update Report

2019 Q2 Update: The COCL team continues its work on parts of the Agreement.
2019 Q3 Update: The COCL team continues its work on parts of the Agreement.
2019 Q4 Update: The COCL team continued its work on parts of the Agreement.
2020 Q1 Update: The COCL team continued its work on parts of the Agreement.
2020 Q2 Update: The COCL team continued its work on parts of the Agreement.
2020 Q3 Update: The COCL team continued its work on the Agreement.
2020 Q4 Update: The COCL team continued its work on the Agreement.
2021 Q1 Update: The COCL team continued its work on the Agreement.
2021 Q2 Update:
2021 Q3 Update:
2021 Q4 Update:
2022 Q1 Update:
2022 Q2 Update:
2022 Q3 Update:
2022 Q4 Update:
## Task Description

COCL's duties and expectations

### Task Requirements:

COCL shall collect information, make recommendations to the City, prepare quarterly, written, public reports detailing PPB's compliance with and implementation of the Agreement, and work with the COAB and the public to receive comments on those reports.

See specific and detailed requirements of the COCL's duties in DOJ Agreement paragraphs #161-164.

### Status

Actively in Process

### Action Steps:

1. City Council will form a staff group to manage the hiring of a Compliance Officer Community Liaison (COCL)
2. Council staff will develop a hiring process and associated documents
3. Council staff will track and document the hiring process, which will include substantial community input
4. Council group will develop initial draft contract, which meets the requirements of this provision
5. Council group will ensure community input during the hiring process and in advance of awarding the contract

## Evidence of Completion:

<table>
<thead>
<tr>
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<th>Received DOJ Approval?</th>
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## Status Note:

- **2014 Q1 Update:** COCL's responsibility
- **2014 Q2 Update:**
- **2014 Q3 Update:**
- **2014 Q4 Update:**
- **2015 Q1 Update:**
- **2015 Q2 Update:**
- **2015 Q3 Update:**
- **2015 Q4 Update:**
- **2016 Q1 Update:**
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- **2018 Q1 Update:**
- **2018 Q2 Update:**
- **2018 Q3 Update:**
- **2018 Q4 Update:**
- **2019 Q1 Update:**

Friday, May 7, 2021
Hiring and duties of PPB Compliance Coordinator

**Task Requirements:** PPB will hire or retain an employee familiar with the operations of PPB for the duration of this Agreement, to serve as a PPB Compliance Coordinator. The Compliance Coordinator will serve as a liaison between PPB and both the COCL and DOJ and will assist with PPB’s compliance with this Agreement. At a minimum, the Compliance Coordinator will adhere to the requirements in the Agreement. See Agreement for specifics, #165.

**Status**  Completed - Closed

**Action Steps:**

**Task Date Completed:** 1/7/2013  □ Received DOJ Approval?  Approval

**Evidence of Completion:**

1. DOJ Compliance Captain P4
2. DOJ Senior Management Analyst P4
3. PPB DOJ Compliance Team description

**Status Note:**

2014 Q1 Update: Captain Marshman serves as the Bureau's Compliance Coordinator.
2014 Q2 Update: Captain Marshman continues in this role.
2014 Q3 Update: This position remains with Captain Marshman.
2014 Q4 Update: Captain Marshman continues to serve in this role.
2015 Q1 Update: Captain Marshman continues to serve as Compliance Coordinator.
2015 Q2 Update: Captain Marshman remains the Bureau's Compliance Coordinator
2015 Q3 Update: This position continues to be filled by Captain Marshman.
2015 Q4 Update: This position continues to be filled by Captain Marshman.
2016 Q1 Update: Captain Marshman remains as the Bureau's Compliance Coordinator.
2016 Q2 Update: At the close of this quarter, Captain Marshman was named the Chief of Police. He, in turn, named Inspector Lt. Steven Jones as Acting Captain and DOJ Compliance Coordinator.
2016 Q3 Update: Lt. Jones was officially promoted to Captain in September and remains DOJ Compliance Coordinator.
2016 Q4 Update: Captain Jones continues to serve as Compliance Coordinator.
2017 Q1 Update: Captain Jones continues to serve as the Bureau's Compliance Coordinator.
2017 Q2 Update: Newly promoted Commander Steve Jones continues to serve as PPB's Compliance Coordinator.
2017 Q3 Update: Commander Steve Jones continues to serve as PPB's Compliance Coordinator.
2017 Q4 Update: Commander Steve Jones continues to serve as PPB's Compliance Coordinator.
2018 Q1 Update: Commander Steve Jones continues to serve as PPB's Compliance Coordinator.
2018 Q2 Update: Commander Steve Jones continues to serve as PPB's Compliance Coordinator.
2018 Q3 Update: Acting Commander Jeff Bell was assigned to serve as the acting PPB Compliance Coordinator.
2018 Q4 Update: Acting Commander Jeff Bell remains the acting PPB Compliance Coordinator.
2019 Q1 Update: Commander Parman assumed the role of the PPB Compliance Coordinator as he was named Commander of the Professional Standards Division.
2019 Q2 Update: Commander Parman continued to serve as PPB Compliance Coordinator.
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Task Description
Training and policy adherence to Agreement

**Task Requirements:**
PPB shall revise and/or develop its policies, procedures, protocols, training curricula, and practices to ensure that they are consistent with, incorporate, address, and implement all provisions of the Agreement specific to force, training, community-based mental health services, crisis intervention, employee information system, officer accountability, and community engagement.

PPB shall revise and/or develop as necessary other written documents such as handbooks, manuals, and forms, to effectuate the provisions of the Agreement. PPB shall send new or revised policies, procedures, protocols, and training curricula regarding use of force, interactions with persons in mental health crisis and systems of accountability to DOJ as they are promulgated, with a copy to the COCL. DOJ and the COCL will provide comments within 45 days and will not unreasonably withhold recommendations about policies, procedures, protocols, and training curricula. The COCL shall seek the timely input of the relevant members of the Training Division and patrol officers, as well as members of the community. If the City disagrees with DOJ's comments, the City shall, within 14 days of being informed of the DOJ's comments, inform the Parties in writing of the disagreement. Within 14 days thereafter, the Parties shall meet and confer on the disagreement at a mutually agreeable time. Upon approval by the Parties, policies, procedures, training curricula, and manuals shall be implemented within 30 days of agreement or the Court's decision. PPB shall provide initial and in-service training to all officers and supervisors with respect to newly implemented or revised policies and procedures. PPB shall document employee review of and training in new or revised policies and procedures.

**Status**
Actively in Process

**Action Steps:**

**Task Date Completed:**

☑ Received DOJ Approval?  Approval

**Evidence of Completion:**
1. In service materials (located in folder #84)
Additionally, evidence is contained within all documents submitted for review by PPB.

**Status Note:**

Friday, May 7, 2021

**2014 Q1 Update:**
During this quarter, PPB continued to engage in this process as relevant policies were revised, training curricula developed or standard forms or documents changed

**2014 Q2 Update:**
PPB created a Directive on the new directives process; revised several existing ones pursuant to the new policy; and formulated a plan to review all DOJ-related directives in a timely fashion pursuant to the Agreement.

**2014 Q3 Update:**
PPB continued the process of reviewing and revising all DOJ-related directives under its new policy. This included the enactment of 2 Mental health and 4 Accountability directives in July; posting 5 Force directives for Universal review on July 1, 2014; 7 Accountability and Reporting directives for Universal review on August 1, 2014; and 10 Discipline Process directives for re-review by the public on September 1, 2014.

**2014 Q4 Update:**
During this quarter, PPB enacted a number of DOJ-related directives including 12 Accountability and Reporting ones; 9 related to the Discipline process; and 5 related to Force. Three other Accountability directives were in the Executive Reconciliation phase as were 5 Training directives.

**2015 Q1 Update:**
In this quarter, PPB enacted a comprehensive directive on Training-1500.00. The two Directives related to Mental Health were posted for their 6 month universal review as were 4 Accountability ones. Thirteen other non DOJ-related ones were posted for their initial universal review under the themes of "investigations" and "external communication protocol."
At the end of the quarter, 28 directives were in the stage of executive reconciliation.

**2015 Q2 Update:**
In the second quarter, PPB enacted 9 directives, three of which were DOJ-related, including Courtesy, Field Training and Lawsuits and Claims. Another 23 were posted in this three month period for universal review as part of the 6 month review requirement in the Agreement for DOJ-related directives.
Finally, 46 directives, including most of the 23 above, are currently in the Executive reconciliation phase at the close of the quarter.

Friday, May 7, 2021
2015 Q3 Update: The third quarter saw fewer DOJ-related directives addressed or enacted as PPB awaits DOJ's comments/feedback/response to a number of outstanding ones on DOJ's list. The only one posted for Universal Review was 1500.00 on Training. Only four were enacted including 310.20--Retaliation Prohibited; 310.50 Truthfulness; 315.00 Laws, Rules and Orders; and 344.00 Compliance with HRAR. A large number remain in the Executive Reconciliation phase (including 310.00, 215.00, 330.00-338.00, 345.00, 850.20-.22 and .25, 344.05, 120.00, 416.00 and 1010.10) pending face-to-face meetings with DOJ to resolve differences.

2015 Q4 Update: In this quarter,

2016 Q1 Update: In the first quarter of 2016 no DOJ-related directives were enacted but the new/renewed plan for monthly DOJ/COCL/PPB directives review meetings was finally instituted in March with the discussion of 850.20.

Two directives were posted for Universal review and those now remain in the Executive reconciliation phase with the others awaiting placement on the monthly review agenda.

2016 Q2 Update: During this quarter, Directive 416.00 was enacted. This is the first of the DOJ-related directives to make it through the parties' new process.

Monthly Directives meetings were convened in April, May and June as we sought to finalize 850.20 and tackled 1500 and 345.

2016 Q3 Update: In the third quarter, PPB finally received the acceptance letter on Directive 850.20 and it was enacted.

There was little other action on directives this quarter as the Bureau spent its energy on filling the open Sr.Management position and putting together a more robust policy team that additionally includes a Management Assistant, a Lieutenant for Policy/Training and a designated Deputy City Attorney.

Monthly Directives meetings continued as the parties finished 1500 and 345 and moved on to a generalized discussion as to the structure and substance of the force policy that PPB is beginning to craft.

2016 Q4 Update: During the fourth quarter, one DOJ-related directive (1500.00 Training) was enacted and six were placed in Executive Reconciliation.

Regular Directives meetings continued with DOJ and COCL. The suite of force directives was the focus of attention this quarter and much effort was expended by all involved in developing these. A final draft of four of those was forwarded to DOJ.

2017 Q1 Update: In the first quarter of 2017, one DOJ-related directive (345.00 EIS) was enacted and five were placed in Executive Reconciliation. Another one, 635.10 Crowd Management/Crowd Control, was placed in the 2nd Universal Review status which is a new step in the directives process.

One regular Directives meeting with DOJ and COCL was held this quarter from February 14-16. The force directives as well as Crowd Control continued to be the focus of drafts and discussions. Specific attention honed in the outstanding Directive 1010.10 which DOJ wants resolved prior to its approval of the other force policies. All parties are anxious to finalize this suite of directives so they can be trained to at the next In-Service.

2017 Q2 Update: During this quarter, the three DOJ-related Mental Health directives (850.21, .22 and .25) were finally enacted after the Unity Center opened. Three other policies transitioned to Executive reconciliation phase from Universal review and six additional ones remained in that phase. Further, six accountability directives and one related to communications with the deaf and hard of hearing were posted for second universal review which is the new step in the directives process which gives the community an opportunity to review the revised version of the policy the Bureau is intending to enact.

2017 Q3 Update: In the third quarter, seven DOJ-related directives were enacted including Crowd Management/Crowd Control; General Reporting Guidelines; Non-Force After Action Reporting; Use of Force; Deadly Force and In-Custody Reporting Investigation Procedures; Weapons Administration; and Weapons Qualifications. Nineteen designated directives, most of which are found in the 300 Accountability series, transitioned from Universal Review to Executive Reconciliation which was completed. They now await approval letters from DOJ before they can be enacted.

Finally, seven previous directives were rescinded as they were addressed/incorporated into other revised DOJ-related policies. That included Dir. 940.00 After Action Reports that is included in 1010.00 as well as several specific weapons policies (e.g. Batons,
Department of Justice Tasks / Quarterly Update Report

2017 Q4 Update: During the fourth quarter, no DOJ-related directives were enacted but four were pending enactment. One directive transitioned from Universal Review to Executive Reconciliation. Thirty-one, including the suite of Accountability directives in the 300 series, remained in Executive Reconciliation status as the new Chief needed an opportunity to review them.

2018 Q1 Update: In this quarter, nineteen directives were enacted. These include 215.00, 220.40, 310.00, 310.20, 310.50, 315.00, 315.30, 330.00-338.00, 344.05, 416.00, and 1501.00.
Six directives transitioned from Universal Review to Executive Reconciliation.
The four mental health related directives remained in Executive Reconciliation awaiting DOJ review of the minor changes.

2018 Q2 Update: During the second quarter, no DOJ directives were enacted.
Seven DOJ-related ones transitioned from 1st Universal Review to Executive reconciliation.
The four mental health related directives received approval by DOJ of the proposed minor changes. They were posted for 2nd Universal Review and remain in Executive Reconciliation status.
The Training directive 1500.00 is pending enactment.

2018 Q3 Update: In the third quarter, no DOJ directives were enacted but the four related to mental health were signed by the Chief and will be effective on October 6th which is 30 days after the date of her signature.

Directive 1500.00 remains Pending Enactment as PPB awaits DOJ's approval of the changes made based on the Chief's review and direction.

One directive transitioned from 1st Universal Review and Executive Reconciliation to 2nd Universal Review. Two others moved from 1st Universal Review to Executive Reconciliation but remain there.

2018 Q4 Update: In this quarter, the four mental health-related directives (850.20, .21, .22 and .25) were enacted as well as Directive 1500.00-Training.

2019 Q1 Update: During the first quarter of 2019, no DOJ related directives were enacted.
One directive was posted for 1st Universal review.
Eighteen transitioned from Universal review to Executive Reconciliation.
Four previously transitioned directives remained in Executive Reconciliation phase during this quarter.
Seventeen policies were posted for 2nd Universal Review period.
An additional sixteen directives are pending DOJ review.

2019 Q2 Update: In this quarter, two DOJ-related directives were enacted.
No DOJ-related directive was posted for 1st Universal Review.
Two transitioned form Universal to Executive Reconciliation.
Twenty-two remained in Executive Reconciliation.
Two were posted for 2nd Universal review period.
Eighteen were reviewed by DOJ and await further action based on PPA.

2019 Q3 Update: During the third quarter, one DOJ-related directive was enacted.

No DOJ-related directive was posted for 1st Universal Review.
No DOJ-related directive transitioned from Universal to Executive Reconciliation.
Twenty-four remained in Executive Reconciliation.
None were posted for 2nd Universal Review.
Twenty-two directives have completed the review and executive reconciliation processes, but have not been reviewed by the DOJ.

Friday, May 7, 2021
since its last meeting with the PPB on June 4, 2019. Note: The PPA asserted its bargaining rights on several of the directives listed below. PPB made additional changes to some of those directives following its June meeting with the DOJ, to address PPA concerns. As of this report, the Bureau continues to hold these policies [prior to sending to the DOJ for final review] during ongoing discussions with the union and to ensure all agreed upon changes between the PPA and the PPB are accurately reflected.

2019 Q4 Update: During the fourth quarter, no DOJ-related directive was enacted.

No DOJ-related directive was posted for 1st Universal Review.

None were posted for 2nd Universal Review.

No DOJ-related directive transitioned from Universal to Executive Reconciliation.

Three remained in Executive Reconciliation.

Twenty directives are pending DOJ review.

2020 Q1 Update: In the first quarter of 2020, three DOJ-related directives were enacted (Use of Force; Weapons Administration; and Weapons Qualification)

Five were posted for 1st Universal Review (the Mental Health suite and Training).

Five transitioned from Universal Review to Executive Reconciliation (those noted above). An additional 10 remained in Executive Reconciliation.

Those same five directives moved to 2nd Universal Review within this quarter.

Twelve are pending enactment, with effective dates between mid and end of April.

2020 Q2 Update: Nineteen DOJ-related directives were enacted this quarter. The vast majority of those were related to the Accountability series. In addition, one was about performance evaluations; another lawsuits and claims; and two related to reporting requirements.

Two were posted for 1st Universal Review--Temporary Altered Duty and Crowd Management/Crowd Control.

Those same two transitioned to Executive Reconciliation as did the Mental Health suite of directives and the Training directive.

The four mental health directives then moved to 2nd Universal Review during the quarter.

2020 Q3 Update: No DOJ-related directive was enacted in the third quarter.

No previously designated DOJ-related policies were posted for 1st Universal Review. However, Directive 320.00 Disclosure of Potential Exculpatory or Impeachment Information (new) which DOJ has expressed desire to review was posted for first review.

That same directive transitioned to Executive Reconciliation during this quarter.

No DOJ-related directives were posted for 2nd Universal Review.

2020 Q4 Update: PPB enacted four DOJ-related policies this quarter which included the suite of mental health directives in Directive 850.20; .21; .22; and .25.

No previously designated DOJ-related policies were posted for 1st Universal Review.

One DOJ-related directive, Critical Incident-Temporary Altered Duty just moved to Executive Reconciliation and another, Crowd
Mangement/Crowd Control, remains in Executive Reconciliation.

One DOJ-related directive was posted for 2nd Universal Review but then moved to Executive Reconciliation as noted above.

2021 Q1 Update: No DOJ-related directive was enacted in the third quarter.
2021 Q2 Update: 
2021 Q3 Update: 
2021 Q4 Update: 
2022 Q1 Update: 
2022 Q2 Update: 
2022 Q3 Update: 
2022 Q4 Update:
Department of Justice Tasks / Quarterly Update Report

Task Description
Public notice and comment on draft changes

Task Requirements: The Chief shall post on PPB’s website final drafts of all new or revised policies that are proposed specific to force, training, community-based mental health services, crisis intervention, employee information system, officer accountability, and community engagement, to allow the public an opportunity for notice and comment, prior to finalizing such policies.

Status Actively in Process

Action Steps: 1. PPB will identify when new or revised policies will stem from implementation provisions of the Agreement
2. PPB will post such policies on its website and announce their publication in other venues to draw attention to the policies

Task Date Completed: Received DOJ Approval? Approval

Evidence of Completion: 1. PPB website DOJ tab www.portlandoregon.gov/police/doj

Status Note:

2014 Q1 Update: None posted this quarter--many are in the internal preparatory phase and will be posted and commented upon next quarter

2014 Q2 Update: Mental Health Directives 850.20 and 850.25 and Accountability Directives 310.00; 310.20; 310.40; 310.50; 311.30; 312.50; 313.10; 315.00; 316.00; 317.40; 344.00; 344.05 as well as Disciplne Process Directives 330.00; 331.00; 332.00; 333.00; 334.00; 335.00; 336.00; 337.00; 338.00; and Juvenile Custody Directives 640.70; 850.30; 870.50 were posted on PPB website for public comment prior to finalizing.

2014 Q3 Update: Force Directives 315.30, 416.00, 1010.00, 1010.10, and 1051.00 were posted for public comment (Universal review) on July 1, 2014 for 30 days.
Accountability and Reporting Directives 120.00, 215.00, 312.00, 345.00, 910.00, 930.00, and 940.00 were posted for public comment (Universal review) on August 1, 2014 for 30 days.
Discipline Process Directives 330.00, 331.00, 332.00, 333.00, 334.00, 335.00, 336.00, 337.00, 338.00 and 635.10 were all re-posted for public comment (Universal review) on September 1, 2014 for 30 days.

2014 Q4 Update: Training Directives 060.50; 210.05; 210.21; 412.00 and 690.00 were posted for Universal Review from November 1, 2014 through November 30, 2014.

2015 Q1 Update: Mental Health Directives 850.20 and 850.25 and Accountability Directives 310.00; 310.40; 312.50; and 317.40 were posted for their 6 month universal review.

2015 Q2 Update: Twenty-three DOJ-related directives were posted on the PPB website for public comment per the universal review process for their required six month review.

2015 Q3 Update: As noted above, only one DOJ-related directive--1500.00 Training--was posted for universal review this quarter and that was for its required six month review. No others were due for a six month or annual review.

2015 Q4 Update: Nine DOJ-related directives were posted for universal review for either its annual review or its first review this quarter--315.30 Satisfactory Performance; 940.00 After Action Reports; and 1010.00-1051.00 all related to Use of Force and the various tools associated with that.
After the 30 day comment period that ended November 30, 2015, they were transitioned into the Executive Reconciliation phase.

2016 Q1 Update: Two DOJ-related directives were posted for universal review this quarter. After the thirty day comment period that ended for both on February 29, 2016, they were transitioned into the Executive reconciliation phase.

2016 Q2 Update: One DOJ-related directive, 310.40 Courtesy, was posted to the web for universal review this quarter for its annual review. It is now in the Executive Reconciliation phase. The minimal number was due, in some measure, to the fact that the Senior Management Analyst for Policy resigned in mid-April. Her replacement has been identified but must complete the background process so PPB anticipates that the policy machine will be back on track in the next quarter.

2016 Q3 Update: No DOJ-related directive was posted on the web for universal review this quarter.

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2016 Q4 Update: No DOJ-related directive was posted on the web for universal review this quarter.

2017 Q1 Update: During this quarter, PPB implemented a new step in the policy review process that now includes a 2nd Universal Review. Two DOJ-related directives (635.10 Crowd Management/Crowd Control and 1090.00 Special Weapons Use) were posted on the web for 1st Universal Review. Crowd Management/Crowd Control went through Executive Reconciliation and was posted for 2nd Universal Review.

2017 Q2 Update: Twenty-one DOJ-related directives were posted on the web for 1st Universal review. This included 15 of the "suite" of accountability policies that are to be addressed next by PPB and DOJ upon completion of the "suite" of force policies. As noted in another paragraph, seven DOJ-related ones were posted for 2nd Universal review.

2017 Q3 Update: There was only one DOJ-related directive, 850.20, posted on the web for Universal review for its annual review. PPB has now made its way through the initial review of all 47 designated directives. In addition, twelve of those were posted for 2nd Universal review after being reconciled with DOJ.

2017 Q4 Update: Thirteen directives were posted on the web for Univeral Review. None were posted for a Second Universal Review during this time period.

2018 Q1 Update: Seven DOJ-related directives due a six month review were posted on the web for 1st Universal Review during this quarter. One directive, 1500.00, was posted for 2nd Universal review as part of its annual review.

2018 Q2 Update: One DOJ-related directive, 1010.10 Deadly Force and In-Custody Death Reporting and Investigative Procedures, was posted for 1st Universal Review for its annual review.

2018 Q3 Update: Seventeen DOJ-related directives, of which most were in the accountability suite, were due for their 6-month review so were posted for their 1st Universal Review period. Directive 345.00 was posted for its 2nd Universal Review.

2018 Q4 Update: One DOJ-related directive, 416.00 Critical Incident-Temporary Altered Duty, was due for its annual review so was posted for 1st Universal Review. Directives 345.00 (EIS); 900.00 (General Reporting Guidelines); 905.00 (Non-Force After Action Reporting); 1010.00 (Use of Force); 1010.10 (Deadly Force and In-Custody Reporting and Investigation Procedures); 1020.00 (Weapons Administration); and 1021.00 (Weapons Qualifications) were posted for their 2nd Universal Review.

2019 Q1 Update: One DOJ-related policy was due for its annual review so was posted for 1st Universal Review. Directives 215.00 (Member Performance Evaluations); 310.00 (Professional Conduct and Courtesy); 310.20 (Discrimination, Harassment and Retaliation Prohibited); 310.50 (Truthfulness); 315.00 Laws, Rules and Orders); 315.30 (Satisfactory Performance); 344.05 (Bias-Based Policing/Profiling Prohibited); 330.00 (Internal Affairs, Complaint Intake, and Processing); 331.00 (Supervisory Investigations); 332.00 (Administrative Investigations); 333.00 (Criminal Investigations of Police Bureau Employees); 344.00 (Performance Deficiencies); 335.00 (Discipline Process); 336.00 (Police Review Board); 337.00 (Police Review Board Personnel Selection); 338.00 (Discipline Guide); and 416.00 (Critical Incident-Temporary Altered Duty) were posted for 2nd Universal Review period during this quarter.

2019 Q2 Update: No DOJ-related policy was due for an annual review.

2019 Q3 Update: No DOJ-related policy was due for an annual review.

2019 Q4 Update: No DOJ-related directive was posted for 2nd Universal Review this quarter.
2020 Q1 Update: The five DOJ-related directives posted for Universal Review were due an annual review.

The same five were posted for 2nd Universal.

2020 Q2 Update: Directive 416.00 was due for annual review and was posted for Universal Review this quarter. It transitioned to Executive Reconciliation.

2020 Q3 Update: No DOJ-related policy was due for an annual review.

No DOJ-related directive was posted for 2nd Universal Review this quarter.

2020 Q4 Update: No DOJ-related policy was due for an annual review.

Directive 416.00 was posted for 2nd Universal Review this quarter.

2021 Q1 Update: Four DOJ-related policies were posted for their annual review

None of the directives posted for 2nd Universal Review were DOJ-related.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Department of Justice Tasks / Quarterly Update Report

Task Description
Policy review by Chief's Office

Task Requirements: The Chief's Office shall coordinate a review of each policy or procedure required by the Agreement 180 days after such policy or procedure is implemented, and annually thereafter (on a regularly published schedule), to ensure that such policy or procedure provides effective direction to PPB personnel and remains consistent with the purpose and requirements of the Agreement.

Status: Open

Action Steps:
1. Ensure that bureau protocols require annual review of policies and protocols.
2. Develop new policy requiring initial 180-day review of new policies or procedures per the requirements of this provision.

Evidence of Completion:

Task Date Completed: Received DOJ Approval? Approval

Evidence of Completion:

Status Note:

2014 Q1 Update: Initial draft of Directive re: review policy prepared

2014 Q2 Update: Directive 010.00 became effective May 1, 2014. The Use of Force, ECW and Satisfactory Performance Directives that took effect on January 1, 2014 will be the first to undergo the new, initial 6 month review on July 1, 2014. Thereafter, all DOJ-related Directives will be scheduled for a 6 month review from their effective date.

2014 Q3 Update: Directives 940.00, 1010.00, 1051.00 and 315.00 were posted for their 180 day required review and are currently in Executive Reconciliation phase.
No annual reviews due yet.

2014 Q4 Update: Directives 940.00, 1010.00 and 1051.00 were enacted on December 4, 2014 and Directive 315.00 was enacted on November 19, 2014 after their six month review was complete.

2015 Q1 Update: Directives 310.00; 310.40; 312.50; 317.40; 850.20; and 850.25 underwent their 6 month review during the quarter. No DOJ-related directives were due for their annual review at this time. Training Directive 1500.00 and Courtesy Directive 310.40 were enacted.
After Executive reconciliation it was decided to re-post the Mental Health directives for universal review as a result of the major restructuring in format that resulted.

2015 Q2 Update: Directives 215.00, 345.00, 330.00, 331.00, 332.00, 333.00, 334.00, 335.00, 336.00, 337.00, 338.00, 850.20, 850.21, 850.22, 850.25, 310.20, 310.50, 315.00, 344.00, 344.05, 120.00, and 1010.10 underwent their 6 month review during this quarter.

Directives 310.40, 220.40 and 1501.00 were the DOJ-related ones that were reviewed and enacted this quarter.

The Mental Health directives were posted for Universal review and thereafter were put on hold for receipt of DOJ and COCL comments. A face-to-face meeting was held in May for PPB, COCL and DOJ to discuss areas of concern. The packet of directives is now in the process of revision with a target date of early August for resubmission to DOJ.

The Discipline directives were also reviewed by DOJ and much work remains to be done in conjunction with IPR before that directive can be revised.

2015 Q3 Update: Training directive 1500.00 was the only DOJ-related directive that was due for its six-month review. None were due for an annual review.

2015 Q4 Update: Directives 315.30; 940.00; 1010.00 and 1051.00 were due for their annual review so were posted on November 1, 2015.
Directives 1020.00; 1030.00; 1035.00; 1040.00; and 1050.00 were posted for their first review on the same date.
Two DOJ-related directives--310.00 and 344.05--were enacted during this quarter although 344.05 will be re-visited as it was
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expedited due to the requirement of a new state law that it be in place on January 1, 2016.

2016 Q1 Update: No DOJ-related directives were enacted nor due for their annual review this quarter.
Directives 630.45 and 870.20 were posted for Universal review for thirty days on February 1, 2016.
Those two and a number of others, including 910.00; 330.00-338.00; 345.00; 850.20; 850.21; 850.22; 850.25; 1010.10; 1500.00;
315.30; 940.00; 1010.00-1050.00; 1051.00; 635.10; and 870.20, remain in Executive reconciliation phase awaiting scheduling for
DOJ/COCL/PPB monthly review meeting and ultimate enactment.

2016 Q2 Update: No DOJ-related directives were due for a six-month review during this time period. Only the one directive, 310.40, was due for its
annual review this quarter.

2016 Q3 Update: No DOJ-related directives were due for a six-month review during this time period. Nor were any directives due for annual review
this quarter.

2016 Q4 Update: No DOJ-related directives were due for a six-month review during this time period. Nor were any directives set for annual review
this quarter.

2017 Q1 Update: No DOJ-related directives were due for a six month review this quarter.

2017 Q2 Update: No DOJ-related directives were due for a six month review this quarter.
Directive 416.00 was due for its annual review in this time period and thus was posted for Universal review.

2017 Q3 Update: Directive 850.20 Police Response to Mental Health Crisis was due for its annual review in this quarter and thus was posted for
Universal review on August 15, 2017.

2017 Q4 Update: The mental health directives 850.21, .22 and .25 were posted for their six month review this quarter.
Directive 1500.00 (Training) was posted for its annual review.

2018 Q1 Update: Directive 1500.00 Training was posted for its 2nd Universal Review during this quarter. The mental health directives, 850.20, .21,
.22, and .25, are in the Executive Reconciliation phase.

2018 Q2 Update: No DOJ-related directives were due for a six month review this quarter.
Directive 1010.10 was posted for its annual review.
The mental health directives, 850.20, .21, .22, and .25, are in the 2nd Universal Review phase.

2018 Q3 Update: Directives 215.00 (Member Performance Evaluation) and 220.40 (Lawsuits and Claims) as well as the suite of accountability
directives (310.00 through 338.00) were due for a six-month review so were posted for their 1st Universal Review period.
Directives 345.00 (EIS), 635.10 (Crowd Management/Crowd Control) and 1010.10 (Deadly Force and In-Custody Death Reporting and
Investigation Procedures) moved to Executive Reconciliation phase.
The EIS directive 345.00 then moved from Executive Reconciliation to begin its 2nd Universal Review period
Directives 900.00 (General Reporting Guidelines), 905.00 (Non-force After Action Reporting), 1010.00 (Use of Force), 1020.00
(Weapons Administration), and 1021.00 (Weapons Qualifications) all remained in Executive Reconciliation status.

2018 Q4 Update: No DOJ-related directives were due for a six month review this quarter. Directive 416.00 was due for its annual review so was posted for its 1st Universal review from November 15, 2018 through November 30, 2018. It then moved to the Executive Reconciliation phase as did the suite of accountability directives and Directive 215.00 (Member Performance Evaluation) and 220.40 (Lawsuits and Claims).

2019 Q1 Update: No DOJ-related directives were due for a six month review this quarter.
Directive 1501.00 (Field Training and Evaluation Program) was due for its annual review so was posted for its 1st Universal review from February 1, 2019-February 15, 2019. It then moved to the Executive Reconciliation phase as did Directives 220.40 Lawsuits and Claims; 635.10 Crowd Management/Crowd Control; 1020.00 Weapons Administration; and 1021.00 Weapons Qualifications.

2019 Q2 Update: No DOJ-related directives were due for a six month review this quarter.
Directive 220.40, Lawsuits and Claims, transitioned from 2nd Universal Review to Executive Reconciliation. Discussions with PPA were initiated and remain ongoing, but the Union did assert its bargaining rights.

Twenty-two DOJ directives remain in Executive Reconciliation of which seventeen were forwarded to DOJ, returned to PPB and the whole suite of accountability directives await resolution with the PPA.

Three DOJ policies (900.00, 905.00 and 1010.10) are pending enactment but await the resolution of Dir. 1010.00.

**2019 Q3 Update:** No DOJ-related directives were due for a six month review this quarter.

Nor were there any DOJ-related directives that transitioned from 2nd Universal Review to Executive Reconciliation.

**2019 Q4 Update:** No DOJ-related directives were due for a six month review this quarter.

Nor were there any DOJ-related directives that transitioned from 2nd Universal Review to Executive Reconciliation.

Three DOJ-related directives, 416.00, 635.10 and 1010.10, remained in Executive Reconciliation.

The suite of accountability directives remained with DOJ as PPB awaits an approval letter.

**2020 Q1 Update:** No DOJ-related directives were due for a six month review this quarter.

Five directives transitioned from 2nd Universal Review to Executive Reconciliation.

Ten other DOJ-related directives remain in Executive reconciliation.

DOJ returned an approval letter on the accountability suite of policies so those will be processed.

**2020 Q2 Update:** Directive 635.10 was technically was due for a six month review this quarter as it had been placed on hold in 2018 based on the recommendation of City Attorney.

Directive 416.00 was due for annual review so was posted for 1st Universal Review.

Both of those then transitioned to Executive Reconciliation during this quarter as did the four mental health directives and the Training directive.

Directive 1010.10 remained in Executive Reconciliation during this quarter.

The four mental health directives then proceeded to 2nd Universal Review and were subsequently enacted along with the Accountability suite of policies; Performance evaluations; Lawsuits and Claims; and the two reporting directives.

The Training (1500.00) and Deadly Force (1010.10) directives are still pending DOJ review.

**2020 Q3 Update:** No DOJ-related directives were due for a six month review this quarter.

Nor were there any DOJ-related directives that transitioned from 2nd Universal Review to Executive Reconciliation.

Two DOJ-related directives remain in Executive Reconciliation.

No DOJ-related directives were enacted this quarter.

Two directives, 1500.00 Training and 1010.10 Deadly Force and In-Custody Death Reporting and Investigation Procedures, were
still pending DOJ review this quarter.

**2020 Q4 Update:** No DOJ-related directives were due for a six month review this quarter nor will there be any in the future unless a completely new directive is created that warrants DOJ approval. The six month requirement is obviously a one time deal.

Two DOJ-related directives--416.00 and 320.00--transitioned from 2nd UR to Executive Reconciliation

One DOJ-related directive, Crowd Control/Crowd Management, remained in Executive Reconciliation where it has been for a period of time due to current issues that need further consideration.

The four mental health-related directives were enacted this quarter.

**2021 Q1 Update:** No DOJ-related directives were due for a six month review this quarter for the reason noted previously.

None of the directives that transitioned from 1st or 2nd Universal Review to Executive Reconciliation were DOJ-related.

No DOJ-related directives were enacted this quarter.

Two DOJ-related directives, Crowd Control/Crowd Management and PPB Reporting of Potential Exculpatory or Impeachment Information (i.e. "Brady policy") remained in Executive Reconciliation due to current issues that need further consideration. The "Brady" policy is still in DOJ's hands pending their review so PPB cannot proceed until response received.

Two other DOJ-related directives are Pending Enactment but are still awaiting DOJ review and response.

**2021 Q2 Update:**

**2021 Q3 Update:**

**2021 Q4 Update:**

**2022 Q1 Update:**

**2022 Q2 Update:**

**2022 Q3 Update:**

**2022 Q4 Update:**
Department of Justice Tasks / Quarterly Update Report

Task Description
Application of policies and officer accountability

Task Requirements: PPB shall apply policies uniformly and hold officers accountable for complying with PPB policy and procedure.

Status Complete - review ongoing

Action Steps:

* Evidence of Completion: 1. Discipline Guide (located in folder #137)

Task Date Completed: 10/10/2013

Received DOJ Approval? Approval

2014 Q1 Update: IA researching the best policy to document this mandate or will create a specific new Directive.

2014 Q2 Update: Directives 345.00 and 940.00 were posted for public comment and are through Universal Review. Both are in Executive Reconciliation, the final stage of completion.

2014 Q3 Update: Directive 345.00 was enacted on October 30, 2014 and Directive 940.00 was enacted on December 4, 2014. Directive 315.00 was enacted on November 19, 2014.

2014 Q4 Update: The above Directives remain in effect.

2015 Q1 Update: Directive 345.00 was posted for universal review in April as part of its 6 month required review and was in the Executive reconciliation phase at end of the quarter.

2015 Q2 Update: Directive 315.00 was posted for universal review on May 2, 2015 for its required 6 month review and was in the Executive reconciliation phase at the end of this quarter as well.

2015 Q3 Update: Directive 315.00 was enacted this quarter.

2015 Q4 Update: Directive 345.00 remains in Executive Reconciliation awaiting DOJ comment.

2016 Q1 Update: Directive 345.00 remained in Executive Reconciliation this quarter as the DOJ site visit scheduled to review this system and inform its feedback originally set for December was postponed until February. However, IA reports the following regarding officer accountability:

- Total cases closed in the 4th Quarter – 26
- Total cases closed with sustained findings – 1
- Total number of Allegations – 86
- Total number of Sustained Allegations – 10
- Total number of Exonerated Allegations – 18
- Total number of In-Policy Findings – 16
- Total number of Not Sustained – 19
- Total number of Unfounded Allegations – 14
- Total number of IA Declined Allegation – 3
- Total number of IPR Dismissed Allegations - 6

2016 Q1 Update: DOJ and its subject matter expert participated in a site visit in February to witness a demonstration of the EIS and question those who are charged with administering it. PPB is now awaiting receipt of a Technical Assistance letter that DOJ is preparing on this subject as well as feedback on Directive 345.00 that has been with DOJ for months.

However, IA reports the following regarding officer accountability:

17 cases closed:
49 total allegations on those closed cases, of which:
15 were sustained
Department of Justice Tasks / Quarterly Update Report

2 were exonerated
5 were exonerated w/debrief
14 were not sustained
7 were not sustained w/debrief
2 were found in policy (OIS)
3 were found in policy w/tactical debrief
1 was unfounded

2016 Q2 Update: PPB, DOJ, and COCL worked together throughout the 2nd quarter to revise and update the EIS directive. The final version is currently in DOJ's hands and once PPB receives the acceptance letter, it will be enacted. Training on the modifications will follow. The revisions that ensue will significantly change the way an employee’s chain of command is required to process an alert, resulting in a more timely, transparent, and accountable response to an alert. PPB and DOJ have also agreed to increase the number of events requiring an EIS entry in the interest of providing more thorough documentation of the work being done on a day to day basis.

In conjunction with the directive re-write, PSD has been revising its SOP for processing alerts which DOJ is reviewing as well. It will outline set criteria for the Administrator to apply in determining which alerts to forward to a supervisor.

2016 Q3 Update: PPB continues to await the acceptance letter on 345.00 from DOJ. The “knowledge check” and training plan are being prepared for implementation upon receipt of the letter.

The SOP will also be put into effect.

2016 Q4 Update: PPB received the acceptance letter on Directive 345.00 from DOJ in mid -October. As required, it was sent to PPA for review. The Union had issues that needed to be discussed; however, the parties were unable to resolve the matter before the end of the quarter. A meeting is scheduled for early 2017 Q1, and it is anticipated the directive will be enacted early in that quarter.

The plan remains to provide supervisors' training on this policy at 2017 In-Service which commences at the beginning of March.

2017 Q1 Update: Directive 345.00 was finally enacted on January 30, 2017. Specific Supervisor training will be conducted during the first 2017 In-Service training course that commenced in March.

2017 Q2 Update: Supervisor training on Directive 345.00 continued through the end of the In-service in May.

2017 Q3 Update: Directive 345.00 remains in effect with no changes this quarter.

2017 Q4 Update: Directive 345.00 remains in effect with no changes this quarter.

2018 Q1 Update: Directive 345.00 remains in effect with no changes this quarter.

2018 Q2 Update: Directive 345.00 remains in effect with no changes this quarter. However, it was the subject of additional training during the 2018 Spring Supervisors' training to address the new alert feedback loop and the definitions of interventions that will now be tracked.

2018 Q3 Update: Directive 345.00 was due for its annual review. It transitioned from Universal Review to Executive Reconciliation during this quarter and is now posted for its thirty day 2nd Universal Review.

2018 Q4 Update: Directive 345.00 was in 2nd Universal Review until October 15, 2018. It is now back in Executive Reconciliation after a question arose regarding which employees are affected by it.

2019 Q1 Update: Directive 345.00 has completed the Review and Executive Reconciliation processes and is pending enactment. It is awaiting formal DOJ approval and then will be signed by the Chief.

2019 Q2 Update: Directive 345.00 was signed by the Chief and became effective on May 15, 2019.

2019 Q3 Update: Directive 345.00 remains in effect with no changes this quarter.

2019 Q4 Update: Directive 345.00 remains in effect with no changes this quarter.

2020 Q1 Update: Directive 345.00 remains in effect with no changes this quarter.

2020 Q2 Update: Directive 345.00 remains in effect with no changes this quarter.

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<tr>
<th>Year/Quarter</th>
<th>Update</th>
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<tr>
<td>2020 Q3</td>
<td>Directive 345.00 remains in effect with no changes this quarter.</td>
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<td>2020 Q4</td>
<td>Directive 345.00 remains in effect with no changes this quarter.</td>
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<td>2021 Q1</td>
<td>Directive 345.00 remains in effect with no changes this quarter.</td>
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Friday, May 7, 2021
Task Description: Agreement Compliance Report

Task Requirements: Beginning with the COCL’s first quarterly report, as set forth in paragraph 166 of the Agreement, PPB shall prepare a status report no later than 45 days before the COCL’s quarterly report is due. The PPB Compliance Coordinator shall lead the effort in preparing this status report and shall provide copies to the COCL, DOJ, and the public. PPB’s report shall delineate the steps taken by PPB during the reporting period to comply with each provision of the Agreement.

Status: Actively in Process

Action Steps:
1. PPB will track implementation of each provision of the agreement
2. PPB will provide detailed analysis of implementation and present implementation progress in a publicly palatable and informative manner
3. PPB will work with the COCL, the DOJ, and other stakeholders to identify opportunities for improvement to the report on an ongoing basis

Evidence of Completion:

Task Date Completed: ☐ Received DOJ Approval? Approval

Status Note:

2014 Q1 Update:
Pending appointment of COCL, PPB has been preparing a quarterly report that it hopes will eventually sync with the COCL’s reporting timeframe.

2014 Q2 Update: While awaiting the naming of the COCL, PPB has continued to prepare its quarterly report. PPB still intends to work with COCL to assure that the timeframes jive with each other.

2014 Q4 Update: PPB prepared its quarterly report as usual. Compliance team met with the newly appointed COCL team at the end of this quarter to discuss the timing of each one’s required report. They agreed on a schedule for their respective reports that meets the requirement.

2015 Q1 Update: PPB prepared this quarterly report which will serve as the required status report for COCL’s next quarterly report. It was posted on the website.

2015 Q2 Update: PPB prepared its quarterly report for submission to the DOJ and the COCL for its use in reporting on PPB compliance. It will be posted on the PPB website.

2015 Q3 Update: PPB prepared its quarterly report pursuant to the required timeframe to be submitted to DOJ and to COCL for its use in reporting on PPB compliance. As usual, it will be posted on PPB’s website.

2015 Q4 Update: PPB prepared its quarterly report in a timely fashion and submitted it to DOJ and COCL for its use in reporting on PPB compliance. As usual, it will be posted on PPB’s website.

2016 Q1 Update: PPB prepared its quarterly report in a timely manner and submitted it to DOJ and COCL for its use in reporting on PPB compliance. It will be posted on PPB’s website as well.

2016 Q2 Update: PPB prepared its quarterly report in a timely fashion and submitted it to DOJ and COCL for its use in reporting on PPB compliance. It will be posted on PPB’s website as usual.

2016 Q3 Update: PPB prepared its quarterly report in a timely fashion and submitted it to DOJ and COCL for its use in reporting on PPB compliance. It will be posted on PPB’s website as usual.

2016 Q4 Update: PPB prepared its quarterly report in a timely fashion and submitted it to DOJ and COCL for its use in reporting on PPB compliance. It will be posted on PPB’s website as usual.

Friday, May 7, 2021
<table>
<thead>
<tr>
<th>Year</th>
<th>Update</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017 Q1</td>
<td>Update</td>
<td>PPB prepared and submitted its quarterly report to DOJ and COCL on time for its use in reporting on PPB compliance. It will be posted on PPB's website as usual.</td>
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<td>2017 Q2</td>
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<td>PPB prepared and submitted its quarterly report to DOJ and COCL on time for its use in reporting on PPB compliance. It will be posted on PPB's website as usual.</td>
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<td>2017 Q3</td>
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<td>2018 Q1</td>
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<td>2020 Q3</td>
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<td>PPB prepared and submitted its quarterly report to DOJ and COCL on time for its use in reporting on PPB compliance. It will be posted on PPB's website as usual.</td>
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<td>PPB prepared and submitted its quarterly report to DOJ and COCL on time for its use in reporting on PPB compliance. It will be posted on PPB's website as usual.</td>
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<tr>
<td>2021 Q1</td>
<td>Update</td>
<td>PPB prepared and submitted its quarterly report for DOJ and COCL's use in reporting on PPB compliance to City Council, per their recent request, for their review in sufficient time for final submission by the City on May 15th as required. It will be posted on PPB's website as usual.</td>
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<td>2021 Q2 Update:</td>
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<td>2022 Q2 Update:</td>
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Task Description
Agreement documents and records retention

Task Requirements: PPB shall maintain all records, as applicable, necessary to document their compliance with the terms of the Agreement and all documents expressly required by the Agreement.

Status Actively in Process

Action Steps: 1. PPB will develop system within PSD and Compliance Coordinator offices to ensure compliance with the requirements of this provision.

Task Date Completed: 

Evidence of Completion: 1. PPB Action Item Database (upon request)
2. PPB DOJ folder located within PSD (provided on USB drive)
3. Training Records Management (upon request)
4. BHU Records Management (upon request)

Status Note:
2014 Q1 Update: PPB is maintaining all documents, pursuant to applicable law, necessary to document compliance. A specific database has been created for that purpose.
2014 Q2 Update: PPB continues to maintain all appropriate documents.
2014 Q3 Update: PPB continues to maintain all pertinent documents.
2014 Q4 Update: PPB continues to maintain all pertinent documents.
2015 Q1 Update: PPB continues to maintain all pertinent documents related to compliance.
2015 Q2 Update: PPB continues to maintain all relevant documents.
2015 Q3 Update: PPB continues to maintain all pertinent documents related to compliance.
2015 Q4 Update: PPB continues to maintain all pertinent documents related to compliance.
2016 Q1 Update: PPB continues to maintain all pertinent documents related to compliance.
2016 Q2 Update: PPB continues to maintain all pertinent documents related to compliance.
2016 Q3 Update: PPB continues to maintain all pertinent documents related to compliance.
2016 Q4 Update: PPB continues to maintain all pertinent documents related to compliance.
2017 Q1 Update: PPB continues to maintain all pertinent documents related to compliance.
2017 Q2 Update: PPB continues to maintain all pertinent documents related to compliance.
2017 Q3 Update: PPB continues to maintain all pertinent documents related to compliance and provides them to DOJ and COCL, upon request.
2017 Q4 Update: PPB continues to maintain all pertinent documents related to compliance and provides them to DOJ and COCL, upon request.
2018 Q1 Update: PPB continues to maintain all pertinent documents related to compliance and provides them to DOJ and COCL, upon request.
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2019 Q2 Update: PPB continues to maintain all pertinent documents related to compliance and provides them to DOJ and COCL, upon request.
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Task Description: Notification to DOJ of collective bargaining updates

Task Requirements: The PPB and the City agree to promptly notify DOJ if any term of this Agreement becomes subject to collective bargaining. The City agrees to keep DOJ apprised of the status of the resulting negotiations.

Status: Open

Action Steps: 1. PPB will ensure that notification is sent to the DOJ upon learning of impending bargaining with the union concerning policies related to the Agreement.

Evidence of Completion:

Task Date Completed: ☐ Received DOJ Approval? Approval

Status Note:

2014 Q1 Update: Not applicable this quarter.
2014 Q2 Update: Not applicable this quarter.
2014 Q3 Update: Not applicable this quarter.
2014 Q4 Update: Not applicable this quarter.
2015 Q1 Update: Not applicable this quarter.
2015 Q2 Update: Not applicable this quarter.
2015 Q3 Update: Not applicable this quarter.
2015 Q4 Update: Not applicable this quarter.
2016 Q1 Update: Not applicable this quarter.
2016 Q2 Update: Not applicable this quarter.
2016 Q3 Update: Not applicable this quarter.
2016 Q4 Update: Not applicable this quarter.
2017 Q1 Update: Not applicable this quarter.
2017 Q2 Update: Not applicable this quarter.
2017 Q3 Update: Not applicable this quarter.
2017 Q4 Update: Not applicable this quarter.
2018 Q1 Update: Not applicable this quarter.
2018 Q2 Update: Not applicable this quarter.
2018 Q3 Update: Not applicable this quarter.
2018 Q4 Update: Not applicable this quarter.
2019 Q1 Update: Not applicable this quarter.
2019 Q2 Update: The PPA asserted bargaining rights to all of the proposed revisions to the 300 series directives as well as the proposed revisions to 1010.00. The City Attorney's office has resolved the issues with the PPA on all of the directives except 310.50, 315.30, and 1010.00. As a result of communications with the union's counsel, the City believes that once the PPA President and the Chief meet to discuss the remaining issues on these directives, the City will be able to come to agreement with the PPA on them. If not, the current version of the directives previously approved by DOJ will remain in place.

Friday, May 7, 2021
2019 Q3 Update: PPA did not assert any new bargaining rights this quarter. Negotiations continued on the directives that were outstanding at the end of last quarter but were not resolved as of yet.

2019 Q4 Update: PPA did not assert any new bargaining rights this quarter.

2020 Q1 Update: PPA did not assert any new bargaining rights this quarter.

2020 Q2 Update: PPA did not assert any new bargaining rights this quarter.

2020 Q3 Update: PPA did not assert any new bargaining rights this quarter.

2020 Q4 Update: PPA did not assert any new bargaining rights concerning DOJ-related directives this quarter.

2021 Q1 Update: PPA did not assert any new bargaining rights concerning DOJ-related directives this quarter.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

2022 Q4 Update:
Employee Signed Acknowledgement of Agreement

Task Requirements:  All PPB officers and persons related to the implementation of the Agreement shall sign a statement indicating that they have read and understand the Agreement within 90 days of the effective date of the Agreement. Such statement shall be retained by PPB. PPB shall require compliance with the Agreement by their respective officers, employees, agencies, assigns, or

Status Actively in Process

Action Steps:  
1. PPB will develop an electronic system for acknowledging receipt of new or revised policies and having read and understood them, per Agreement #85 g
2. PPB will require all personnel read and sign statement of understanding for new or revised policies

Task Date Completed:  

Received DOJ Approval? Approval

Evidence of Completion:

Status Note:

2014 Q1 Update:  Electronic system developed and ready to be utilized upon signing of the Agreement

2014 Q2 Update:

2014 Q3 Update:  Agreement signed by Judge Simon on August 29, 2014. Once the final version was received from the CAO, it was posted on the PPB’s Intranet with a message from the Chief indicating he expected all members to read and acknowledge by Oct. 29, 2014. By the end of this quarter, a number of members had already signed the acknowledgment. This task will be completed long before the end of next quarter

2014 Q4 Update:  All available members have signed a form acknowledging that they have read and understand the settlement agreement. The Compliance team is working with the Personnel Division to develop a protocol to assure that all new employees receive instruction to do the same.

2015 Q1 Update:  The responsibility for assuring the compliance of new employees will fall to the RU manager.

2015 Q2 Update:  It is a continuing requirement that all new employees read and acknowledge the Settlement Agreement.

2015 Q3 Update:  It is a continuing expectation that all new employees read and acknowledge the Settlement Agreement. That involved 13 individuals this quarter who all complied.

2015 Q4 Update:  It is an ongoing expectation that all new employees read and acknowledge the Settlement Agreement. That involved 11 individuals this quarter who all complied.

2016 Q1 Update:  It is a continuing expectation that all new employees read and acknowledge the Settlement Agreement. There were 15 new hires throughout the Bureau this quarter and all complied.

2016 Q2 Update:  PPB hired 3 Officers during Q2 and each of them has signed off as having read and acknowledged the settlement agreement. The other 4 non-sworn employees hired during the quarter also did so.

2016 Q3 Update:  PPB hired 9 new police officers during this quarter and each of them has signed off as having read and acknowledged the Settlement Agreement. There were also five non-sworn employees hired who also fulfilled this requirement.

2016 Q4 Update:  It is a continuing expectation that all new employees read and acknowledge the Settlement Agreement. PPB hired 9 new police officers and 7 non-sworn employees during the fourth quarter, and each of them has signed off as having read and acknowledged the Settlement Agreement.

2017 Q1 Update:  PPB hired 22 new police officers and 8 non-sworn employees during the quarter. All new employees read and acknowledged the Settlement Agreement as required.

2017 Q2 Update:  PPB hired 18 new police officers and 3 non-sworn employees during this quarter. All new employees read and acknowledged the Settlement Agreement as required.

Friday, May 7, 2021
2017 Q3 Update: PPB hired 37 new employees this quarter. Eighteen were new police officers and 19 were non-sworn positions. All new employees read and acknowledged the Settlement Agreement as required.

2017 Q4 Update: PPB hired 20 new employees this quarter. Twelve were new police officers and 8 were non-sworn positions. All new employees read and acknowledged the Settlement Agreement as required.

2018 Q1 Update: PPB hired 28 new employees in the first quarter. Twenty-three were new officers and five were non-sworn positions. All new employees read and acknowledged the Settlement Agreement.

2018 Q2 Update: PPB hired 11 new employees in the second quarter. Six were new officers and five were non-sworn positions. All new employees read and acknowledged the Settlement Agreement.

2018 Q3 Update: PPB hired 15 new employees during the third quarter. Ten were new officers and five were non-sworn positions. All new employees read and acknowledged the Settlement Agreement.

2018 Q4 Update: PPB hired 12 new employees during the fourth quarter. Four were new officers and eight were civilian positions. All new employees except the temporary part-time high school student who only worked a week during Christmas break read and acknowledged the Settlement Agreement.

2019 Q1 Update: PPB hired 20 new employees during the first quarter of 2019. Ten were new officers and 10 were civilian positions. All new employees except the temporary person read and acknowledged the Settlement Agreement.

2019 Q2 Update: PPB hired 19 new employees during the second quarter of this year. Eight were new officers and 11 were civilian positions. All new employees read and acknowledged the Settlement Agreement.

2019 Q3 Update: PPB hired 20 new employees during the third quarter of this year. Fourteen were new officers and 6 were civilian positions. All new employees read and acknowledged the Settlement Agreement.

2019 Q4 Update: PPB hired 29 new employees during this quarter. Fourteen were new officers and eleven were civilian positions. All new employees read and acknowledged the Settlement Agreement.

2020 Q1 Update: PPB hired 32 new employees during this quarter. Twenty-one were new officers and eleven were civilian positions. All new employees, with the exception of one officer who resigned days after joining the Bureau, read and acknowledged the Settlement Agreement.

2020 Q2 Update: PPB hired 31 new employees in the second quarter. All were sworn officers except for one PS3. Two were former hires that had already signed and acknowledged. Of the remaining 29, one went out on LOS prior to the 30 days and the rest have read and acknowledged the Agreement, albeit two were late.

2020 Q3 Update: PPB hired one new employee in the third quarter. The individual assumed a non-sworn position and has signed and acknowledged the Settlement Agreement.

2020 Q4 Update: PPB hired one new employee in the the fourth quarter. The individual assumed a non-sworn position and has signed and acknowledged the Settlement Agreement.

2021 Q1 Update: PPB hired five new employees in the first quarter. All five assumed a non-sworn position and have signed and acknowledged the Settlement Agreement.

2021 Q2 Update:

2021 Q3 Update:

2021 Q4 Update:

2022 Q1 Update:

2022 Q2 Update:

2022 Q3 Update:

Friday, May 7, 2021