



OCCUPATIONAL ANALYSIS OF THE
PRIVATE PATROL OPERATOR QUALIFIED MANAGER PROFESSION



BUREAU OF SECURITY AND INVESTIGATIVE SERVICES

OCCUPATIONAL ANALYSIS OF THE PRIVATE PATROL OPERATOR QUALIFIED MANAGER PROFESSION



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This occupational analysis report is mandated by California Business and Professions (B&P) Code § 139 and by DCA Licensure Examination Validation Policy OPES 18-02.

EXECUTIVE SUMMARY

The Bureau of Security and Investigative Services (Bureau) requested that the Department of Consumer Affairs' Office of Professional Examination Services (OPES) conduct an occupational analysis (OA) of the private patrol operator qualified manager (PPO-QM) profession in California. The purpose of the OA is to define practice in terms of critical tasks that PPO-QMs must be able to perform competently at the time of licensure. The results of this OA provide a description of practice for the PPO-QM profession and provide the basis for developing a valid and legally defensible California Private Patrol Operator Qualified Manager Examination.

OPES test specialists began by researching the profession and conducting telephone interviews with licensed PPO-QMs working in counties throughout California. The purpose of these interviews was to identify the tasks performed by PPO-QMs and to determine the knowledge required to perform those tasks in a safe and competent manner. Using the information gathered from the research and the interviews, OPES test specialists developed a preliminary list of tasks performed by PPO-QMs in their profession, along with statements representing the knowledge needed to perform those tasks.

In October 2020, OPES convened a workshop to review and refine the preliminary lists of tasks and knowledge statements describing PPO-QM practice in California. PPO-QMs participated in the workshops as subject matter experts (SMEs). The SMEs were from diverse backgrounds in the profession (e.g., work setting, geographic location of practice, years licensed). In May 2021, OPES convened a second workshop to review and finalize the lists of tasks and knowledge statements. The SMEs also linked each task with the knowledge required to perform that task and reviewed demographic questions to be used on the OA questionnaire.

After the second workshop, OPES test specialists developed a three-part OA questionnaire to be completed by PPO-QMs statewide. Development of the OA questionnaire included a pilot study that was conducted with a group of PPO-QMs who participated in the October 2020 and May 2021 workshops. The pilot study participants' feedback was incorporated into the final questionnaire, which was administered from July 1, 2021 to August 15, 2021.

In the first part of the OA questionnaire, PPO-QMs were asked to provide demographic information related to their practice and work settings. In the second part, PPO-QMs were asked to rate how often they perform each task in their current practice (Frequency) and how important the task is to effective performance of their current practice (Importance). In the third part, PPO-QMs were asked to rate how important

each knowledge statement is to effective performance of their current practice (Importance).

In June 2021, on behalf of the Bureau, OPES sent an email to 1,486 licensed PPO-QMs, inviting them to complete the online OA questionnaire. The email invitation was sent to PPO-QMs for whom the Bureau had an email address on file.

A total of 420 PPO-QMs, or approximately 28.3% of the PPO-QMs who received an email invitation, responded to the OA questionnaire. The final number of respondents included in the data analysis was 141 (9.5%). This response rate reflects two adjustments. First, OPES excluded data from respondents who indicated they were not currently licensed and working as a PPO-QM in California. Second, OPES excluded questionnaires containing a large portion of incomplete responses.

OPES test specialists then performed data analyses on the task and knowledge ratings obtained from the questionnaire respondents. The task importance and frequency ratings were combined to derive an overall criticality index for each task statement. The mean of importance ratings was used as the criticality index for each knowledge statement.

Once the data were analyzed, OPES conducted an additional workshop with PPO-QMs in August 2021. The SMEs evaluated the criticality indices and determined whether any tasks or knowledge statements should be eliminated. The SMEs in this group also established the final linkage between tasks and knowledge statements, reviewed the task and knowledge statement content areas, and defined those content areas. The SMEs then evaluated the preliminary content area weights and determined the final weights for the new Private Patrol Officer Qualified Manager Examination outline.

The examination outline is structured into three content areas weighted relative to the other content areas. The new outline identifies the tasks and knowledge critical to competent PPO-QM practice in California at the time of license issuance.

The examination outline developed as a result of this OA provides a basis for developing the Private Patrol Operator Qualified Manager Examination.

OVERVIEW OF THE PRIVATE PATROL OPERATOR QUALIFIED MANAGER EXAMINATION OUTLINE

Content Areas and Subareas	Content Area Description	Weight (%)
1. Management of Business Operations	This area assesses the candidate's knowledge of managing business operations and interacting with customers to create contracts to provide PPO security services.	35
1A. Scope of Work and Contracts		15
1B. Business Practices		20
2. Management of Security Personnel	This area assesses the candidate's knowledge of managing security personnel, fulfilling employer obligations to employees, and verifying the training and certifications of current and prospective employees.	35
2A. Employment Obligations		16
2B. Verification of Training and Certificates		19
3. Management of Security Operations	This area assesses the candidate's knowledge of managing security assignments of employees to meet professional obligations and adhere to requirements for reportable incidents that occur during security assignments.	30
3A. Security Assignments and Professional Obligations		20
3B. Incident Management and Reporting Obligations		10
TOTAL		100

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CHAPTER 1 | INTRODUCTION

PURPOSE OF THE OCCUPATIONAL ANALYSIS

The Bureau of Security and Investigative Services (Bureau) requested that the Department of Consumer Affairs' Office of Professional Examination Services (OPES) conduct an occupational analysis (OA) as part of the Bureau's comprehensive review of the private patrol operator qualified manager (PPO-QM) profession in California. The purpose of the OA is to identify critical activities performed by PPO-QMs in California. The results of this OA provide a description of practice for the PPO-QM profession and a basis for constructing a valid and legally defensible California Private Patrol Operator Qualified Manager Examination.

PARTICIPATION OF SUBJECT MATTER EXPERTS

California PPO-QMs participated as subject matter experts (SMEs) during the OA to ensure that the description of practice directly reflects current PPO-QM practice in California. These SMEs represented the profession in terms of work settings, geographic location of practice, and years of experience. The SMEs provided technical expertise and information regarding different aspects of practice through interviews and workshops. During interviews, the SMEs provided information about the tasks involved in practice and the knowledge required to perform those tasks safely and competently. During workshops, the SMEs developed and reviewed the tasks and knowledge statements describing PPO-QM practice, organized the tasks and knowledge statements into content areas, evaluated the results of the OA, and developed the examination outline.

ADHERENCE TO LEGAL STANDARDS AND GUIDELINES

Licensure, certification, and registration programs in the State of California adhere strictly to federal and state laws and regulations, as well as to professional guidelines and technical standards. For the purposes of OAs, the following laws and guidelines are authoritative:

- California Business and Professions (B&P) Code § 139.
- 29 Code of Federal Regulations Part 1607 – Uniform Guidelines on Employee Selection Procedures (1978).
- California Fair Employment and Housing Act, Government Code § 12944.
- Principles for the Validation and Use of Personnel Selection Procedures (2018), Society for Industrial and Organizational Psychology (SIOP).

- *Standards for Educational and Psychological Testing* (2014), American Educational Research Association, American Psychological Association, and National Council on Measurement in Education.

For a licensure program to meet these standards, it must be solidly based upon the job activities required for practice.

DESCRIPTION OF OCCUPATION

The PPO-QM occupation is described as follows in §§ 7582.1(a) and 7582.22(a) of the B&P Code:

§ 7582.1

(a) A private patrol operator, or operator of a private patrol service, within the meaning of this chapter is a person, other than an armored contract carrier, who, for any consideration whatsoever:

Agrees to furnish, or furnishes, a watchman, guard, patrolperson, or other person to protect persons or property or to prevent the theft, unlawful taking, loss, embezzlement, misappropriation, or concealment of any goods, wares, merchandise, money, bonds, stocks, notes, documents, papers, or property of any kind; or performs the service of a watchman, guard, patrolperson, or other person, for any of these purposes.

§ 7582.22

(a) The business of each licensee shall be operated under the active direction, control, charge, or management, in this state, of the licensee, if he or she is qualified, or the person who is qualified to act as the licensee's manager, if the licensee is not qualified.

CHAPTER 2 | OCCUPATIONAL ANALYSIS QUESTIONNAIRE

SUBJECT MATTER EXPERT INTERVIEWS

The Bureau provided OPES with a list of PPO-QMs to contact for telephone interviews. During the semi-structured interviews, seven PPO-QMs were asked to identify the major content areas of practice and the tasks performed in each area. They were also asked to identify the knowledge necessary to perform each task safely and competently.

TASKS AND KNOWLEDGE STATEMENTS

To develop a preliminary list of tasks and knowledge statements, OPES test specialists integrated the information gathered from literature reviews of profession-related sources (e.g., previous OA reports, articles, industry publications, and laws and regulations) and from interviews with SMEs.

In October 2020 and May 2021, OPES test specialists facilitated two workshops to review and refine the tasks and knowledge statements. Ten SMEs from diverse backgrounds (e.g., work setting, geographic location, and years licensed) participated in these workshops. During the first workshop, SMEs evaluated the tasks and knowledge statements for technical accuracy, level of specificity, and comprehensiveness. In addition, SMEs evaluated the organization of task statements within content areas to ensure that the content areas were independent and non-overlapping.

During the second workshop, the SMEs finalized the statements and performed a linkage between the tasks and knowledge statements. The linkage was performed to identify the knowledge required for performance of each task and to verify that each statement of knowledge is important for safe and competent practice as a PPO-QM. Additionally, the linkage ensured that all task statements were linked to at least one knowledge statement and that each knowledge statement was linked to at least one task statement.

During this workshop, SMEs also evaluated the scales that would be used for rating tasks and knowledge statements in an online OA questionnaire to be sent to PPO-QMs statewide. The SMEs also reviewed and revised the proposed demographic questions for the online OA questionnaire.

OPES used the final lists of tasks and knowledge statements, demographic questions, and rating scales to develop the online OA questionnaire.

QUESTIONNAIRE DEVELOPMENT

OPES test specialists developed the online OA questionnaire designed to solicit PPO-QMs' ratings of the tasks and knowledge statements. The surveyed PPO-QMs were instructed to rate how often they perform each task in their current practice (Frequency) and how important each task is to the effective performance of their current practice (Importance). In addition, they were instructed to rate how important each item of knowledge is to the effective performance of their current practice (Importance). The OA questionnaire also included a demographic section to obtain relevant professional background information about responding PPO-QMs. The OA questionnaire can be found in Appendix E.

PILOT STUDY

Before administering the final questionnaire, OPES conducted a pilot study of the online questionnaire. The draft questionnaire was reviewed by the Bureau and then sent to 12 SMEs who had participated in either the interviews or workshops. OPES received feedback on the pilot study from seven respondents. The SMEs reviewed the tasks and knowledge statements in the questionnaire for technical accuracy and for whether they reflected PPO-QM practice. The SMEs also provided the estimated time for completion of the questionnaire, as well as information about online navigation and ease of use. OPES test specialists used this feedback to refine the final questionnaire, which was administered from July 1, 2021 to August 15, 2021.

CHAPTER 3 | RESPONSE RATE AND DEMOGRAPHICS

SAMPLING STRATEGY AND RESPONSE RATE

In June 2021, on behalf of the Bureau, OPES sent an email to a sample of 1,486 PPO-QMs licensed in California for whom the Bureau had an email address on file, inviting them to complete the online OA questionnaire. The email invitation can be found in Appendix D.

A total of 420 PPO-QMs, or approximately 28.3% of the PPO-QMs who received the email invitation, responded to the OA questionnaire. The final number of respondents included in the data analyses was 141 (9.5%). This response rate reflects two adjustments. First, OPES excluded data from respondents who indicated they were not currently licensed and working as a PPO-QM in California. Second, OPES excluded data from questionnaires with a large portion of incomplete responses. The final respondent sample appears to represent the California PPO-QM profession based on the sample's demographic composition.

DEMOGRAPHIC SUMMARY

As shown in Table 1 and Figure 1, the responding PPO-QMs reported a range of years of experience and were distributed across the predefined experience level categories. A majority of the respondents (68.8%) reported they had worked as a PPO-QM for 5 years or less, while 31.2% reported having worked as a PPO-QM for 6 years or longer. When asked about their highest level of education, 27% of respondents reported a high school diploma, 25.5% reported an associate degree, and 24.1% reported a bachelor's degree (Table 2 and Figure 2).

Respondents were then asked about their employment experience before qualifying for a PPO-QM license. As shown in Table 3 and Figure 3, 49.6% reported that they had security guard experience, 27.7% reported law enforcement experience, 13.5% reported military experience, and 8.5% reported proprietary or in-house security experience. When asked about additional California licenses or certifications held, most respondents reported that they held a Private Patrol Operator license (65.2%) and/or an Exposed Firearms Permit (55.3%).

Approximately 14.9% of the respondents reported that they also had a firearms training instructor's license, and 9.2% reported having a baton training instructor's license, while 13.5% reported having no other licenses or permits (Table 4 and Figure 4).

Table 5 and Figure 5 show that most respondents reported that they work more than 40 hours per week as a PPO-QM (48.9%), while 23.4% reported that they work 21–40 hours, and 26.9% reported working 20 hours or fewer per week.

Most respondents described the business structure in which they work as a corporation (59.6%), while 35.5% described it as a sole proprietorship, and 4.3% described it as a partnership (Table 6 and Figure 6).

Respondents were also asked what type of security services are provided by the businesses in which they work. Table 7 and Figure 7 show a breakdown of the responses. Respondents selected all that applied. The majority of respondents reported that their business provided standing guard services (77.3%), armed security services (61.7%), and vehicle patrol (52.5%). Other frequently reported services included event services (57.4%), security consultation (49.5%), and executive protection (48.2%). Most respondents reported that their business employs 25 or fewer part-time employees (85.8%) or full-time employees (83.6%), while 14.1% reported that it employs 26 or more part-time employees, and 14.2% reported 26 or more full-time employees (Tables 8 and 9 and Figures 8 and 9).

Respondents were also asked what type of training is provided in-house in the businesses in which they work. The most common type of training reported was Power to Arrest (53.9%), security guard skills training (53.2%), defense tactics / arrest control (33.3%), and less-lethal weapons training (22%). Approximately 20.6% of respondents reported that the business they work for provides firearms training, 20.6% reported chemical weapons training, and 12.8% reported baton training (Table 10 and Figure 10).

Respondents also reported on the use of outside facilities to provide employee training. Table 11 and Figure 11 show that 43.3% of respondents reported that outside facilities were used to provide Power to Arrest training (43.3%), security guard skills training (42.6%), defensive tactics / arrest control training (33.3%), and less-lethal weapons training (34%). Approximately 48.9% of respondents reported that outside facilities were used to provide firearms training, 42.6% for chemical weapons training, and 50.4% for baton training.

Table 12 and Figure 12 show that most respondents reported that their primary work setting is in an urban area (88.5%). Table 13 shows the location of respondents' primary practice by geographical region. Additional demographic information from respondents can be found in Tables 1–13 and Figures 1–11.

TABLE 1 – YEARS LICENCED AS A PPO-QM

YEARS	NUMBER (N)	PERCENT
Less than a year	17	12.1
1–5 years	80	56.7
6–10 years	19	13.5
11–15 years	8	5.7
16–20 years	13	9.2
More than 20 years	4	2.8
Total	141	100

FIGURE 1 – YEARS LICENSED AS A PPO-QM

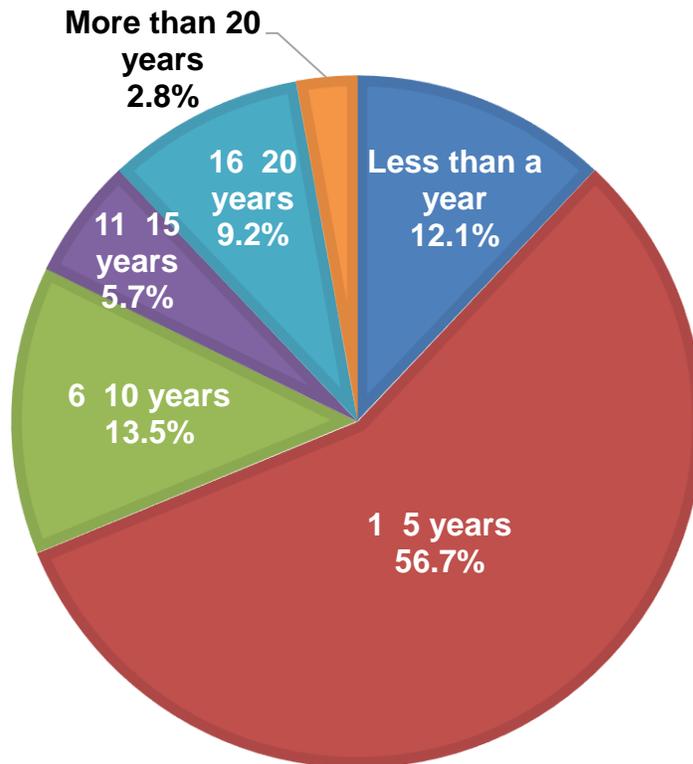


TABLE 2 – HIGHEST LEVEL OF EDUCATION ACHIEVED

DEGREES	NUMBER (N)	PERCENT
High school diploma / GED	38	27.0
Associate degree	36	25.5
Bachelor's degree	34	24.1
Master's degree	17	12.1
Doctorate	4	2.8
Other (please specify)	11	7.8
Total	140	100*

*NOTE: Percentages do not add to 100 due to rounding.

FIGURE 2 – HIGHEST LEVEL OF EDUCATION ACHIEVED

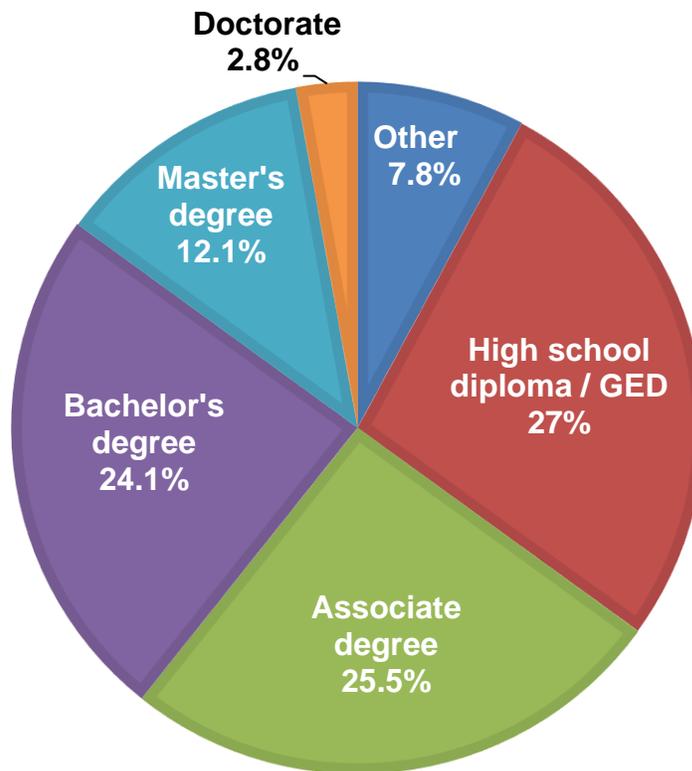


TABLE 3 – WORK EXPERIENCE BEFORE QUALIFYING AS A PPO-QM

TYPE OF WORK	NUMBER (N)	PERCENT
Security guard	70	49.6
Law enforcement	39	27.7
Military	19	13.5
Proprietary or in-house security	12	8.5
Total	140	100*

*NOTE: Percentages do not add to 100 due to rounding.

FIGURE 3 – WORK EXPERIENCE BEFORE QUALIFYING AS A PPO-QM

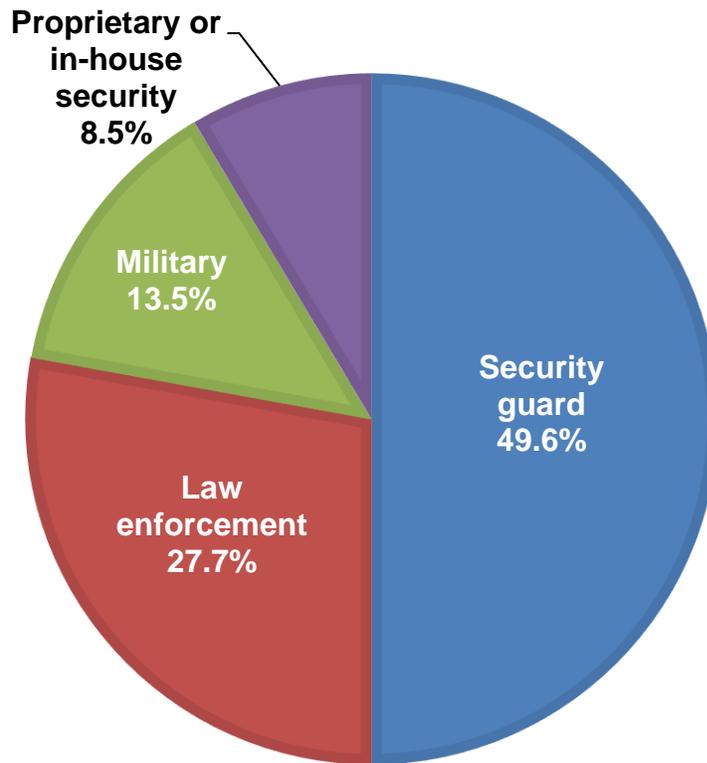


TABLE 4 – OTHER CALIFORNIA LICENSES OR PERMITS HELD*

TYPE	NUMBER (N)	PERCENT**
None	19	13.5
Alarm Company Operator	1	0.7
Private Investigator	12	8.5
Private Patrol Operator	92	65.2
Exposed Firearms Permit	78	55.3
Training Instructor, Baton	13	9.2
Training Instructor, Firearms	21	14.9
Other	33	23.4

*NOTE: Respondents were asked to select all that apply.

**NOTE: Percentages indicate the proportion in the sample of respondents.

FIGURE 4 – OTHER CALIFORNIA LICENSES OR PERMITS HELD

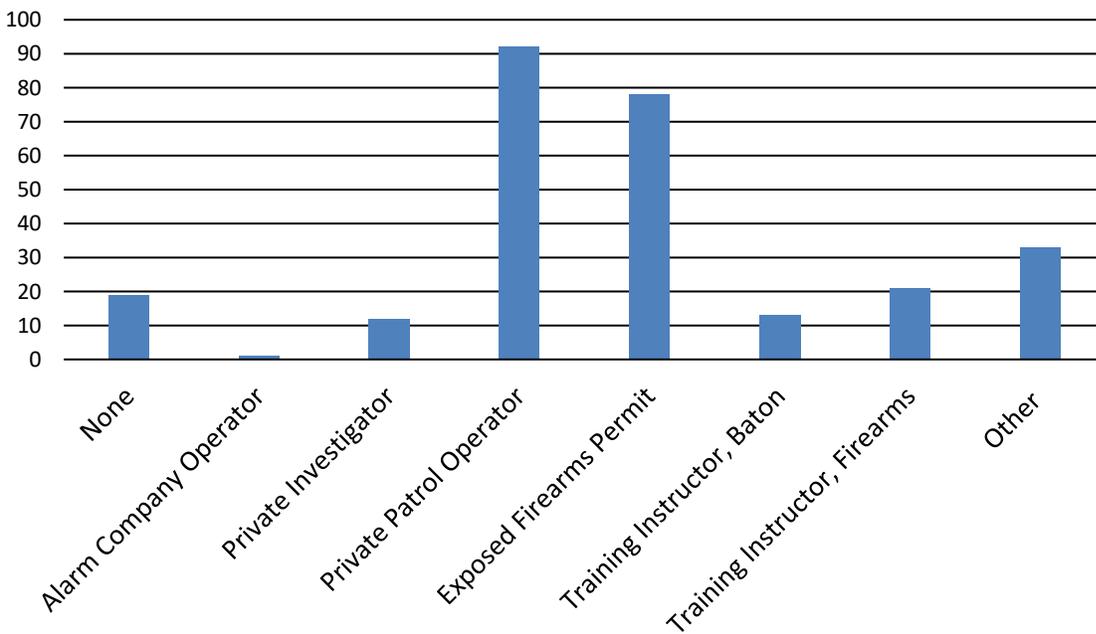


TABLE 5 – HOURS WORKED PER WEEK

HOURS	NUMBER (N)	PERCENT
10 hours or fewer	22	15.6
11–20 hours	16	11.3
21–30 hours	13	9.2
31–40 hours	20	14.2
More than 40 hours	69	48.9
Total	140	100*

*NOTE: Percentages do not add to 100 due to rounding.

FIGURE 5 – HOURS WORKED PER WEEK

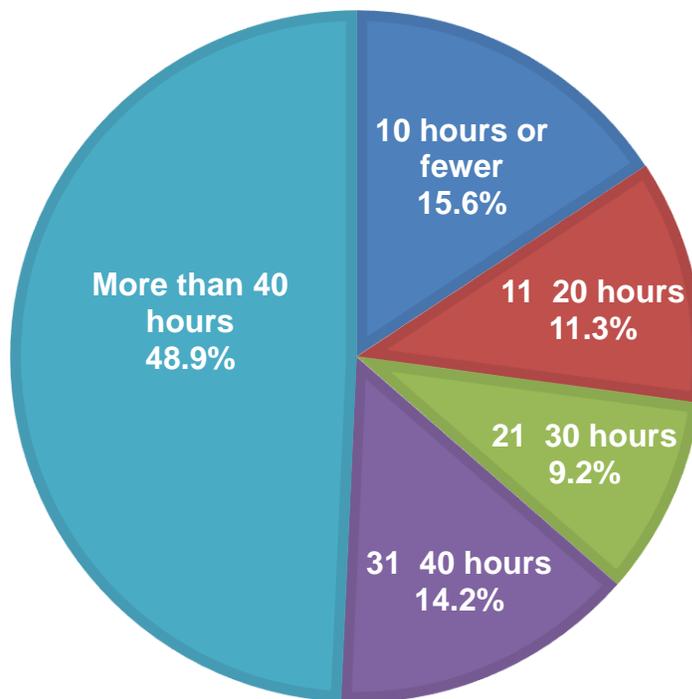


TABLE 6 – PRIVATE PATROL OPERATOR BUSINESS STRUCTURE

TYPE	NUMBER (N)	PERCENT
Corporation	84	59.6
Partnership	6	4.3
Sole proprietorship	50	35.5
Total	140	100*

*NOTE: Percentages do not add to 100% due to rounding.

FIGURE 6 – PRIVATE PATROL OPERATOR BUSINESS STRUCTURE

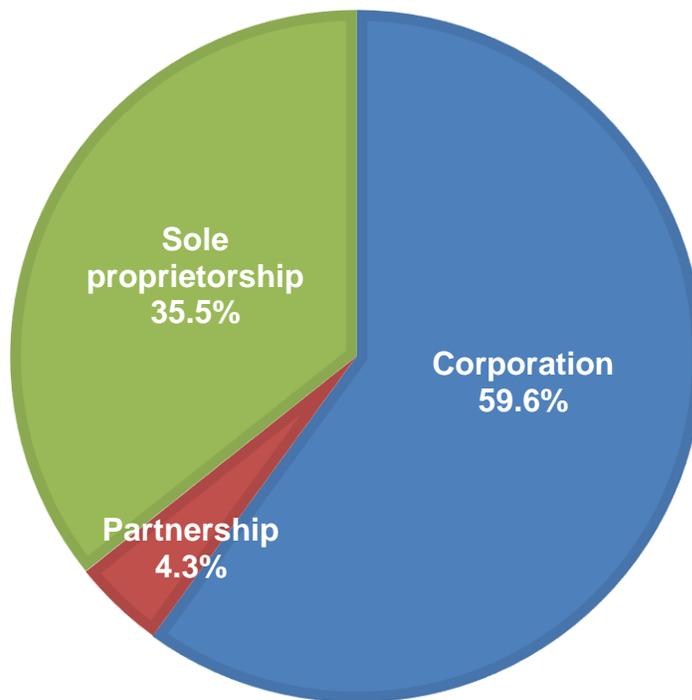


TABLE 7 – SECURITY SERVICES OFFERED*

SERVICES	NUMBER (N)	PERCENT**
Alarm Response	21	14.9
Armed Courier	15	10.6
Armed Security	87	61.7
Events Security	81	57.4
Executive Protection	68	48.2
Loss Prevention	34	24.1
Security Consultant	70	49.5
Standing Guard	109	77.3
Vehicle patrol	74	52.5
Video Surveillance Monitoring	33	23.4
Other (please specify)	5	3.5

*NOTE: Respondents were asked to select all that apply.

**NOTE: Percentages indicate the proportion in the sample of respondents.

FIGURE 7 – SECURITY SERVICES OFFERED

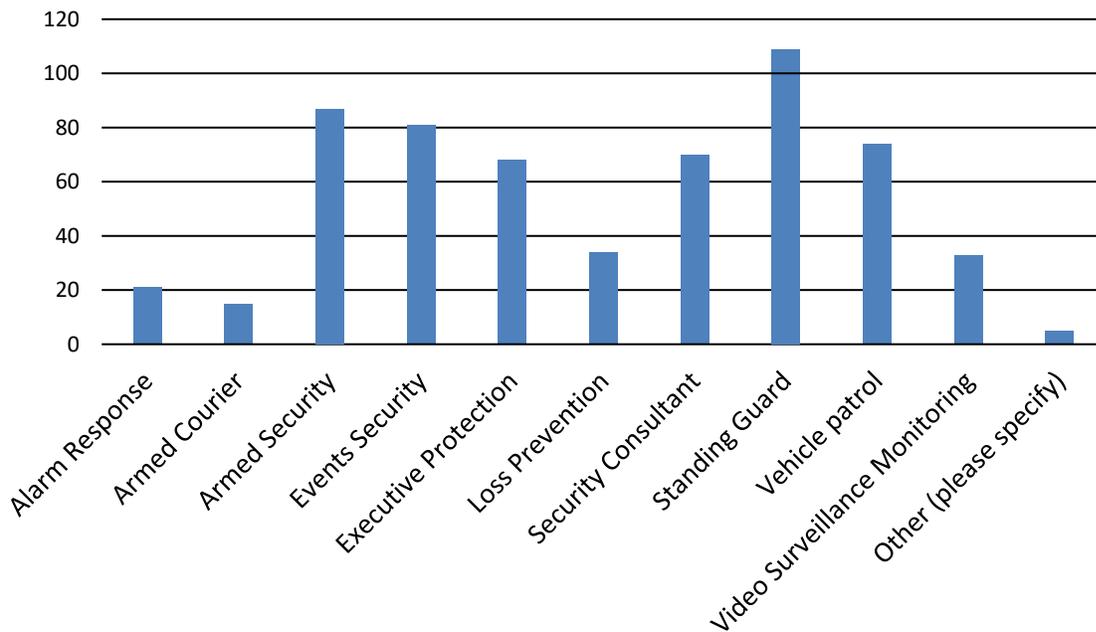


TABLE 8 – PART-TIME EMPLOYEES IN PPO ORGANIZATION

EMPLOYEES	NUMBER (N)	PERCENT
None	19	13.5
1–25 employees	102	72.3
26–50 employees	12	8.5
51–75 employees	2	1.4
76–100 employees	4	2.8
101–300 employees	2	1.4
Total	141	100*

*NOTE: Percentages do not add to 100% due to rounding.

FIGURE 8 – PART-TIME EMPLOYEES IN PPO ORGANIZATION

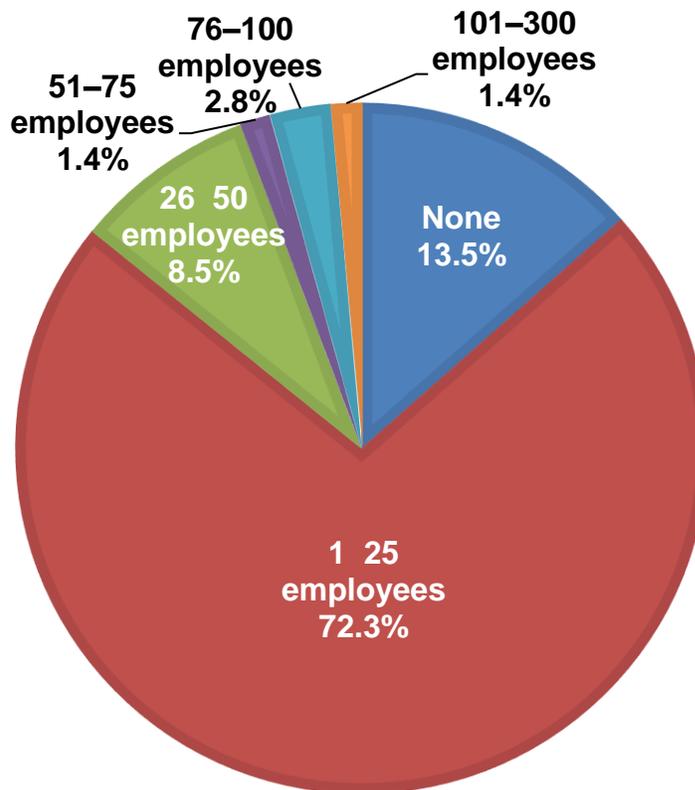


TABLE 9 – FULL-TIME EMPLOYEES IN PPO ORGANIZATION

EMPLOYEES	NUMBER (N)	PERCENT
None	27	19.1
1–25 employees	91	64.5
26–50 employees	7	5.0
51–75 employees	3	2.1
76–100 employees	6	4.3
101–300 employees	3	2.1
Over 300 employees	1	0.7
Total	138	100*

*NOTE: Percentages do not add to 100% due to rounding.

FIGURE 9 – FULL-TIME EMPLOYEES IN PPO ORGANIZATION

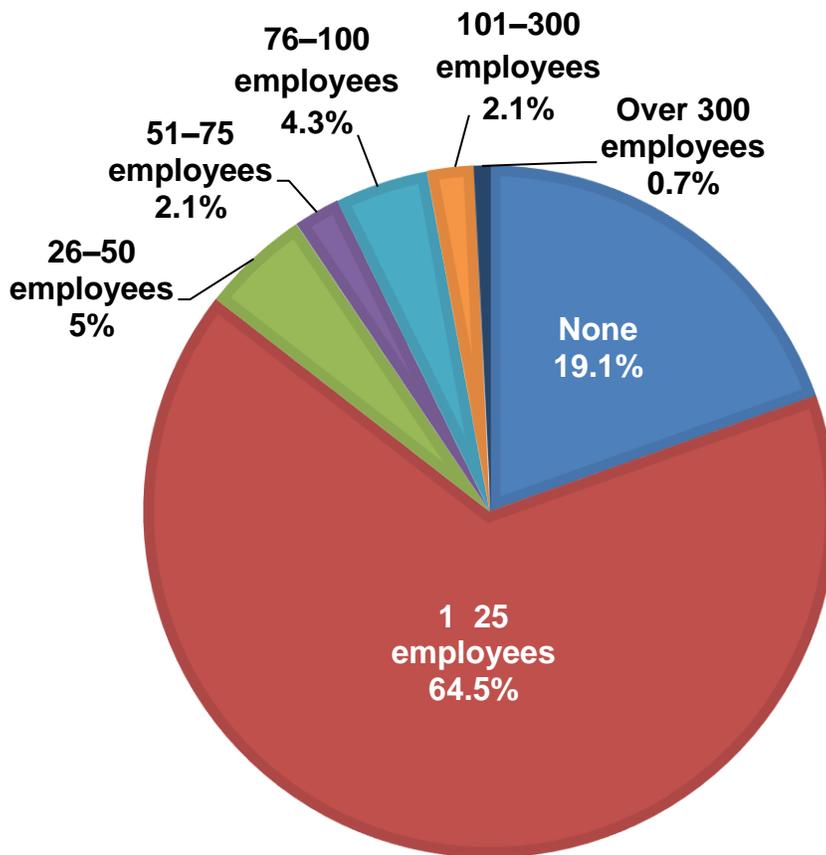


TABLE 10 – TYPES OF TRAINING PROVIDED IN-HOUSE*

TRAINING TYPE	NUMBER (N)	PERCENT**
None	40	28.4
Baton training	18	12.8
Chemical weapons training	29	20.6
Defensive tactics / Arrest control	47	33.3
Firearms training	29	20.6
Less-lethal weapons training	31	22.0
Power to arrest / WMD	76	53.9
Security guard skills training (AB 2880)	75	53.2
Vehicle patrol	74	52.5
Video surveillance monitoring	32	22.7

*NOTE: Respondents were asked to select all that apply.

**NOTE: Percentages indicate the proportion in the sample of respondents.

FIGURE 10 – TYPES OF TRAINING PROVIDED IN-HOUSE

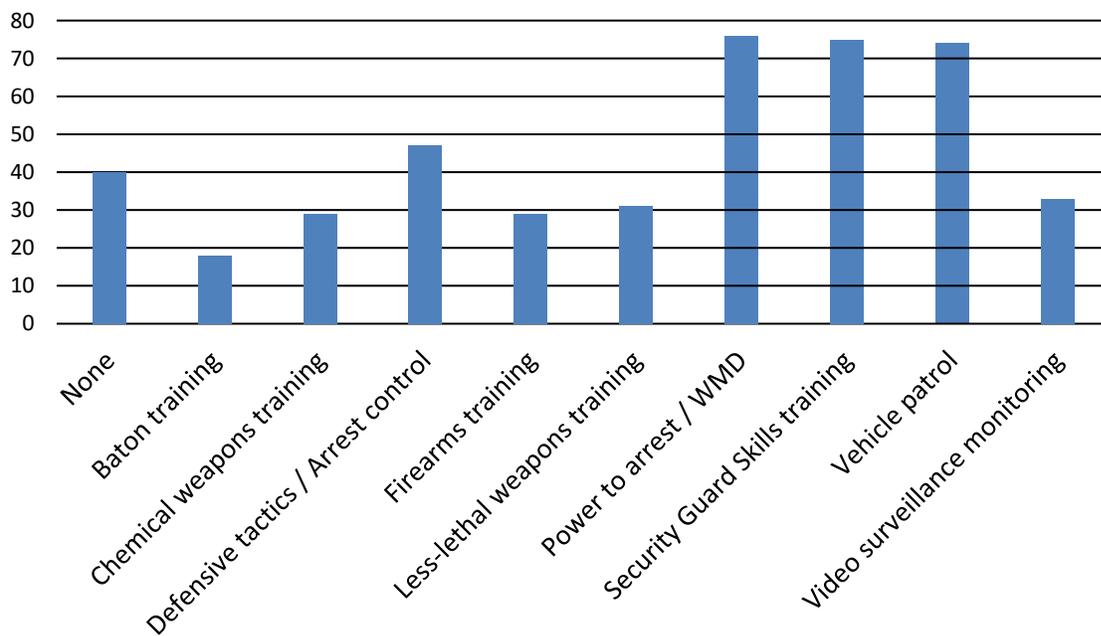


TABLE 11 – TYPES OF TRAINING ACQUIRED FROM OUTSIDE FACILITIES*

TRAINING TYPE	NUMBER (N)	PERCENT**
None	34	24.1
Baton Training	71	50.4
Chemical weapons training	60	42.6
Defensive tactics / Arrest control	47	33.3
Firearms training	69	48.9
Less-lethal weapons training	48	34.0
Power to arrest / WMD	61	43.3
Security guard skills training (AB 2880)	60	42.6
Vehicle patrol	73	51.8
Video surveillance monitoring	33	23.4

*NOTE: Respondents were asked to select all that apply.

**NOTE: Percentages indicate the proportion in the sample of respondents.

FIGURE 11 – TYPES OF TRAINING ACQUIRED FROM OUTSIDE FACILITIES

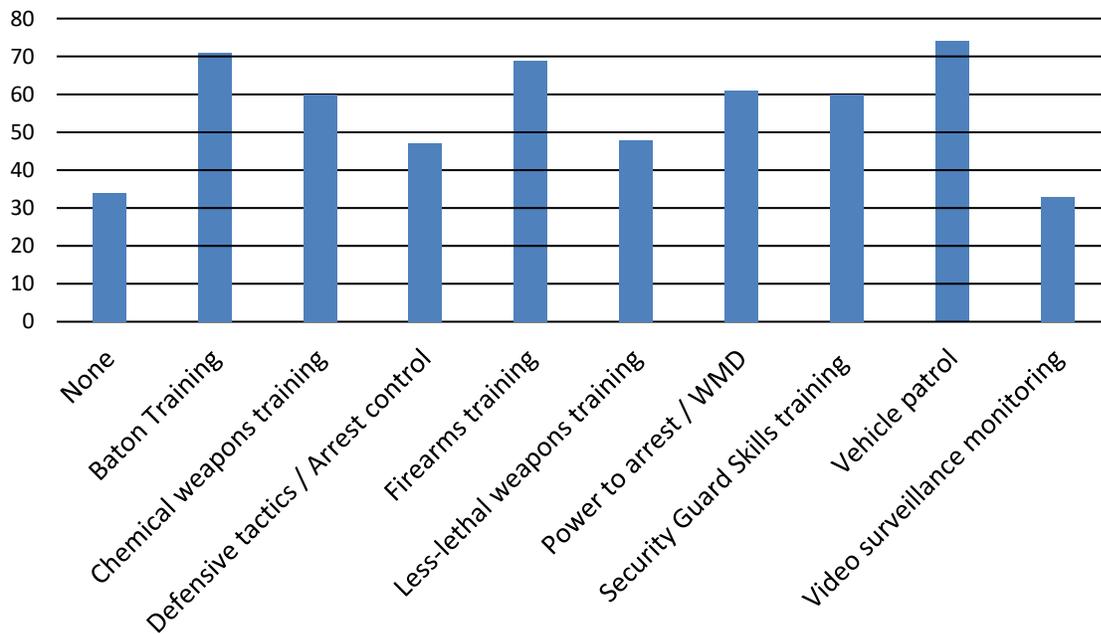


TABLE 12 – LOCATION OF PRIMARY WORK SETTING

LOCATION	NUMBER (N)	PERCENT
Urban (More than 50,000 people)	123	88.5
Rural (Fewer than 50,000 people)	16	11.5
Total	139	100

TABLE 13 – RESPONDENTS BY REGION

REGION NAME	NUMBER (N)	PERCENT
Los Angeles County and Vicinity	64	45.4
San Francisco Bay Area	23	17.0
San Joaquin Valley	10	7.1
Sacramento Valley	4	2.8
San Diego County and Vicinity	10	7.1
Shasta-Cascade	1	0.7
Riverside and Vicinity	13	9.2
Sierra Mountain Valley	3	2.1
North Coast	4	2.8
South Coast and Central Coast	8	5.7
Total	140	100*

*NOTE: Percentages do not add to 100% due to rounding.

CHAPTER 4 | DATA ANALYSIS AND RESULTS

RELIABILITY OF RATINGS

OPES evaluated the task and knowledge ratings obtained from the questionnaire respondents with a standard index of reliability, coefficient alpha (α), which ranges from 0 to 1. Coefficient alpha is an estimate of the internal consistency of the respondents' ratings of the tasks and knowledge statements. A higher coefficient value indicates more consistency between respondent ratings. Coefficients were calculated for all respondent ratings.

Table 14 displays the reliability coefficients for the task statement rating scale in each content area. The overall ratings of task frequency and task importance across content areas were highly reliable (frequency $\alpha = .947$; importance $\alpha = .939$). Table 15 displays the reliability coefficients for the knowledge statement rating scale in each content area. The overall ratings of knowledge importance across content areas were highly reliable ($\alpha = .989$). These results indicate that the responding PPO-QMs rated the tasks and knowledge statements consistently throughout the questionnaire.

TABLE 14 – TASK SCALE RELIABILITY*

CONTENT AREA	NUMBER OF TASKS	α FREQUENCY	α IMPORTANCE
1. Management of Business Operations	9	.873	.857
2. Management of Security Personnel	10	.909	.848
3. Management of Security Operations	11	.877	.877
Total	30	.947	.939

*Note: Reliability was calculated using all tasks in the questionnaire.

TABLE 15 – KNOWLEDGE SCALE RELIABILITY*

CONTENT AREA	NUMBER OF KNOWLEDGE STATEMENTS	α IMPORTANCE
1. Management of Business Operations	20	.961
2. Management of Security Personnel	36	.979
3. Management of Security Operations	33	.977
Total	89	.989

*Note: Reliability was calculated using all knowledge statements in the questionnaire.

TASK CRITICALITY INDICES

To calculate the criticality indices of the task statements, OPES test specialists used the following formula. For each respondent, OPES first multiplied the frequency rating (Fi) and the importance rating (Ii) for each task. Next, OPES averaged the multiplication products across respondents as shown below:

$$\text{Task criticality index} = \text{mean} [(F_i) \times (I_i)]$$

The task statements were sorted by descending order of their criticality index and by content area. The task statements included in the survey are presented in Appendix B, along with their mean frequency and importance ratings and their associated criticality indices.

OPES convened a workshop of seven SMEs in August 2021. The purpose of this workshop was to identify the essential tasks and knowledge required for safe and competent PPO-QM practice at the time of licensure. The SMEs reviewed the mean frequency and importance ratings for each task and its criticality index to determine whether to establish a cutoff value below which task statements should be eliminated. Based on their review of the relative importance of tasks to PPO-QM practice, the SMEs determined that no cutoff value should be set and that all the task statements should be retained.

KNOWLEDGE IMPORTANCE RATINGS

To determine the importance of each knowledge statement, the mean importance (K Imp) rating for each knowledge statement was calculated. The knowledge statements included in the survey are presented in Appendix C, along with their mean importance ratings, sorted by content area.

The SMEs participating in the August 2021 workshop also reviewed the knowledge statement mean importance ratings. After reviewing the mean importance ratings and considering their relative importance to PPO-QM practice, the SMEs determined that no cutoff value should be set. However, the SMEs determined that the knowledge statement K26 was no longer applicable to practice. Therefore, K26 was removed from the examination outline. The SMEs added the word “verifying” to K53 to clarify the PPO-QM’s role of verifying registrations and certifications, and K64 was changed to omit “Cal” to incorporate both California and national OSHA standards. These statements, with their original wording and changes, are highlighted in Appendix C.

TASK-KNOWLEDGE LINKAGE

The SMEs who participated in the August 2021 workshop reviewed the preliminary assignments of the tasks and knowledge statements to content areas from the May 2021 workshop. They then confirmed the final linkage between tasks and knowledge statements.

Table 17 contains the final tasks and knowledge statements that comprise the Private Patrol Operator Qualified Manager Examination outline.

CHAPTER 5 | EXAMINATION OUTLINE

CONTENT AREAS AND WEIGHTS

The SMEs in the August 2021 workshop were also asked to finalize the weights of the content areas that would form the Private Patrol Operator Qualified Manager Examination outline. OPES test specialists presented the SMEs with preliminary weights of the content areas, which were calculated by dividing the sum of the criticality indices for the tasks in each content area by the overall sum of the criticality indices for all tasks, as shown below.

$$\frac{\text{Sum of Criticality Indices for Tasks in Content Area}}{\text{Sum of Criticality Indices for All Tasks}} = \text{Percent Weight of Content Area}$$

The SMEs evaluated the preliminary content area weights in terms of how well they reflected the relative importance of each content area to entry level PPO-QM practice in California. Through discussion, the SMEs determined that adjustments to the preliminary weights were necessary to more accurately reflect the relative importance of each area to PPO-QM practice. The weight for content area “Management of Business Operations” was increased, while the weights for content areas “Management of Security Personnel” and “Management of Security Operations” were decreased. A summary of the preliminary and final content area weights is presented in Table 16.

TABLE 16 – CONTENT AREA WEIGHTS

CONTENT AREA	Preliminary Weights	Final Weights
1. Management of Business Operations	30%	35%
2. Management of Security Personnel	36%	35%
3. Management of Security Operations	34%	30%
Total	100%	100%

The SMEs reviewed the content areas and wrote descriptions for each content area. They organized the tasks and knowledge statements into subareas within each content area and distributed the content area weight across the subareas. The content areas, subareas, and associated weights were then finalized and provide the basis of the Private Patrol Operator Qualified Manager Examination outline. The final examination outline is presented in Table 17.

TABLE 17 – EXAMINATION OUTLINE FOR THE PRIVATE PATROL OPERATOR QUALIFIED MANAGER EXAMINATION

1. MANAGEMENT OF BUSINESS OPERATIONS (35%): This area assesses the candidate’s knowledge of managing business operations and interacting with customers to create contracts to provide PPO security services.

Section	Task Statements	Knowledge Statements
1A. Scope of Work and Contracts (15%)	T1. Assess client security needs to determine scope of work.	K1. Knowledge of laws related to providing private security services. K2. Knowledge of methods for evaluating security needs of potential clients. K3. Knowledge of criteria for providing executive protection, standing guard, or vehicle patrol service. K4. Knowledge of requirements for using active law enforcement as personnel in private security assignments.
	T2. Prepare breakdown of costs to provide clients with estimate of fees for security services.	K5. Knowledge of laws related to providing cost estimates for proposed security services. K6. Knowledge of methods for developing budgets for proposed security services.
	T3. Develop contracts to specify details of security services.	K7. Knowledge of laws related to contracting with clients for private security services. K8. Knowledge of methods for developing scope of work and costs contract provisions.
	T4. Evaluate parameters of security services contract to determine whether subcontracts can be used.	K9. Knowledge of laws related to use of subcontractors in security details.

1. MANAGEMENT OF BUSINESS OPERATIONS (35%), continued: This area assesses the candidate's knowledge of managing business operations and interacting with customers to create contracts to provide PPO security services.

Section	Task Statements	Knowledge Statements
1B. Business Practices (20%)	T5. Manage business practices to comply with requirements regarding PPO organization operations.	K10. Knowledge of laws regarding PPO qualified manager obligations. K11. Knowledge of laws regarding PPO business entities and structures. K12. Knowledge of laws regarding fictitious business name requirements. K13. Knowledge of laws regarding out-of-state security organizations operating in California.
	T6. Obtain insurance to comply with liability requirements for injury, death, or property damage.	K14. Knowledge of laws regarding general liability insurance coverage requirements for private security services. K15. Knowledge of laws regarding insurance documentation and submission requirements.
	T7. Oversee development of marketing materials to ensure conformance with advertisement requirements.	K16. Knowledge of laws regarding advertising or soliciting security business services.
	T8. Maintain security contract records to comply with record-keeping best practices.	K17. Knowledge of laws regarding record-keeping of private security services provided.
		K18. Knowledge of requirements regarding potential BSIS records audits.
	T9. Confirm billable time records to invoice clients for security services.	K19. Knowledge of methods for managing billable time records.
		K20. Knowledge of laws pertaining to fraudulent billing practices.

2. MANAGEMENT OF SECURITY PERSONNEL (35%): This area assesses the candidate’s knowledge of managing security personnel, fulfilling employer obligations to employees, and verifying the training and certifications of current and prospective employees.

Section	Task Statements	Knowledge Statements
2A. Employment Obligations (16%)	T10. Screen applicants to verify qualifications of security guards or security patrolpersons.	K21. Knowledge of laws regarding interviewing security guards and patrolpersons.
		K22. Knowledge of laws regarding security personnel training and qualification requirements.
		K23. Knowledge of laws prohibiting discriminatory hiring practices.
		K24. Knowledge of methods for verifying licenses, permits, and credentials of potential security personnel.
	T11. Perform applicant background checks to identify convictions or pending charges that would prohibit applicant from working as a security guard or patrolperson.	K25. Knowledge of laws regarding criminal offenses and private security employment.
		K27. Knowledge of methods for conducting background checks of potential security personnel.
		K28. Knowledge of methods for identifying fraudulent documentation.
		K29. Knowledge of requirements for notifying BSIS of fraudulent information or documentation.
		K30. Knowledge of laws regarding employee wages, breaks, and other forms of compensation.
	T12. Provide payment to security guards and patrolpersons to compensate services rendered.	K31. Knowledge of laws regarding paid time off and unpaid leave requirements.

2. MANAGEMENT OF SECURITY PERSONNEL (35%), continued: This area assesses the candidate’s knowledge of managing security personnel, fulfilling employer obligations to employees, and verifying the training and certifications of current and prospective employees.

Section	Task Statements	Knowledge Statements
2A. Employment Obligations, continued (16%)	T13. Maintain personnel records to address employment and termination documentation requirements.	K32. Knowledge of laws regarding record-keeping and retention of employee personnel records.
		K33. Knowledge of laws regarding confidentiality of employee personnel files.
		K34. Knowledge of laws regarding disclosure of or access to employee personnel files.
		K35. Knowledge of laws regarding BSIS audits of personnel files.
	T14. Maintain records of employee certifications and training to document qualifications of security officers and patrolpersons.	K36. Knowledge of laws regarding the maintenance of security personnel certifications.

2. MANAGEMENT OF SECURITY PERSONNEL (35%), continued: This area assesses the candidate’s knowledge of managing security personnel, fulfilling employer obligations to employees, and verifying the training and certifications of current and prospective employees.

Section	Task Statements	Knowledge Statements
2B. Verification of Training and Certificates (19%)	T15. Evaluate employee’s completion of security officer skills training to promote the safety of persons and property.	K37. Knowledge of competency components associated with security officer skills training program.
	K38. Knowledge of the relationship between security officer training and public protection.	
	T16. Evaluate compliance with Power to Arrest training to establish employee awareness of professional responsibilities and limitations.	K39. Knowledge of the elements of penal codes and their enforcement.
	K40. Knowledge of responsibilities associated with making a citizen’s arrest.	
	K41. Knowledge of the relationship between a security guard and peace officer in making an arrest.	
	K42. Knowledge of limitations of security guard or patrolperson Power to Arrest.	
	K43. Knowledge of restrictions associated with security guard searches and seizures.	
	K44. Knowledge of types of liabilities associated with Power to Arrest.	
	K45. Knowledge of laws regarding trespassing by security detail.	
	K46. Knowledge of requirements regarding security guard training in Power to Arrest.	
K47. Knowledge of methods for training security guards in Power to Arrest provisions.		
K48. Knowledge of requirement for providing security guards with Power to Arrest guidebook.		
T17. Verify proficiency with firearms or other weapons to determine current qualifications of employee.	K49. Knowledge of laws related to less-lethal weapons certification and use.	
K50. Knowledge of laws related to baton license and use.		
K51. Knowledge of laws related to firearms license and use of deadly force.		
K52. Knowledge of methods for evaluating employee competence in the use of firearms or other weapons.		

2. MANAGEMENT OF SECURITY PERSONNEL (35%), continued: This area assesses the candidate’s knowledge of managing security personnel, fulfilling employer obligations to employees, and verifying the training and certifications of current and prospective employees.

Section	Task Statements	Knowledge Statements
2B. Verification of Training and Certificates, continued (19%)	T18. Certify proofs of registration to ensure security personnel remain current.	K53. Knowledge of laws related to verifying registrations and certifications of personnel.
	T19. Provide annual practice or review with registered employees to promote security officer skills.	K54. Knowledge of laws related to firearms records retention.
	K55. Knowledge of laws related to continuing education requirements for security personnel.	K56. Knowledge of methods for performing annual skills evaluations of security personnel.

3. MANAGEMENT OF SECURITY OPERATIONS (30%): This area assesses the candidate’s knowledge of managing security assignments of employees to meet professional obligations and adhere to requirements for reportable incidents that occur during security assignments.

Section	Task Statements	Knowledge Statements
3A. Security Assignments and Professional Obligations (20%)	T20. Develop post orders to specify details of security assignments.	K57. Knowledge of components that should be included in post orders.
		K58. Knowledge of methods for developing workforce instructions.
		K59. Knowledge of protocols for managing emergency situations.
		K60. Knowledge of methods for monitoring adherence to operating procedures and duties.
		K61. Knowledge of procedures for security personnel post-incident reporting.
		K62. Knowledge of methods for resolving or following up on reported post incidents.
		K63. Knowledge of requirements related to supervision of personnel at security assignments.
	T21. Develop safety guidelines to protect employees and the public during security assignments.	K64. Knowledge of laws regarding OSHA requirements.
		K65. Knowledge of protocols for managing hazardous materials.
		K66. Knowledge of methods for promoting employee and public safety on security assignments.
T22. Review responsibilities and limitations with security personnel to reinforce adherence during assignments.	K67. Knowledge of laws regarding level of authority of security guards and private patrolpersons.	
	K68. Knowledge of laws regarding false arrest, detainment, and confinement.	
	K69. Knowledge of methods for training personnel in the rights, obligations, and restrictions of private security details.	

3. MANAGEMENT OF SECURITY OPERATIONS (30%), continued: This area assesses the candidate’s knowledge of managing security assignments of employees to meet professional obligations and adhere to requirements for reportable incidents that occur during security assignments.

Section	Task Statements	Knowledge Statements
3A. Security Assignments and Professional Obligations, continued (20%)	T23. Review responsibilities and limitations of the use of force to reinforce adherence during private security assignments.	K70. Knowledge of laws regarding use of force and deadly force during security assignments.
		K71. Knowledge of principles of de-escalation of force.
		K72. Knowledge of laws regarding possession and carrying of firearms and other weapons in private security assignments.
		K73. Knowledge of standards regarding criminal and civil liability associated with use of force.
		K74. Knowledge of principles of firearms safety and weapons handling during security assignments.
	T24. Provide uniforms and equipment to identify personnel as private security during assignments.	K75. Knowledge of laws regarding design and use of security guard uniforms, badges, and patches.
		K76. Knowledge of methods for obtaining BSIS approval for security guard uniforms and badges.
		K77. Knowledge of laws regarding use of motorized vehicles in security assignments.
	T25. Maintain professional integrity when managing security operations to uphold trust in the profession.	K78. Knowledge of laws regarding scope of practice.
		K79. Knowledge of laws regarding unprofessional conduct.

3. MANAGEMENT OF SECURITY OPERATIONS (30%), continued: This area assesses the candidate’s knowledge of managing security assignments of employees to meet professional obligations and adhere to requirements for reportable incidents that occur during security assignments.

Section	Task Statements	Knowledge Statements
3B. Incident Management and Reporting Obligations (10%)	T26. Monitor employee conduct to identify violations of the qualifications, functions, and duties of the profession.	K80. Knowledge of laws regarding scope of practice of security personnel.
		K81. Knowledge of laws regarding discrimination in the workplace.
	T27. Review work activity reports to identify incidents that require additional action or training.	K82. Knowledge of types of incidents that indicate need for additional training of security personnel.
		K83. Knowledge of methods for training security personnel in private security detail procedures.
	T28. Report discharge of firearms or use of other weapons during security assignments to notify BSIS of circumstances surrounding incidents.	K84. Knowledge of laws regarding reporting of firearms discharge or use of other weapons.
		K85. Knowledge of types of information to include on Incident Report to BSIS.
		K86. Knowledge of requirements for submitting Incident Reports within specified time frame.
	T29. Report physical altercations that occur during security assignments to alert BSIS of circumstances surrounding injury or arrest.	K87. Knowledge of laws regarding the reporting of physical altercations.
		K18. Knowledge of requirements regarding potential BSIS records audits.
	T30. Report unlicensed or unregistered private security activity to notify BSIS of violations.	K88. Knowledge of types of unlicensed or unregistered activity in private security industry.
	K89. Knowledge of requirements for submitting unlicensed and unregistered activity lead forms.	

CHAPTER 6 | CONCLUSION

The OA of the private patrol operator qualified manager profession described in this report provides a comprehensive description of current PPO-QM practice in California. The procedures employed to perform the OA were based on a content validation strategy to ensure that the results accurately represent PPO-QM practice. Results of this OA provide information regarding current practice that can be used to develop a valid and legally defensible California Private Patrol Operator Qualified Manager Examination.

Use of the Private Patrol Operator Qualified Manager Examination outline contained in this report ensures that the Bureau is compliant with Business and Professions Code § 139.

This report provides all documentation necessary to verify that the analysis has been completed in accordance with legal, professional, and technical standards.

APPENDIX A | RESPONDENTS BY REGION

LOS ANGELES COUNTY AND VICINITY

County of Practice	Frequency
Los Angeles	61
Orange	3
TOTAL	64

NORTH COAST

County of Practice	Frequency
Humboldt	1
Mendocino	1
Sonoma	2
TOTAL	4

RIVERSIDE AND VICINITY

County of Practice	Frequency
Riverside	7
San Bernardino	6
TOTAL	13

SACRAMENTO VALLEY

County of Practice	Frequency
Butte	0
Glenn	0
Sacramento	4
Sutter	0
Yolo	0
Yuba	0
TOTAL	4

SAN DIEGO COUNTY AND VICINITY

County of Practice	Frequency
Imperial	0
San Diego	10
TOTAL	10

SAN FRANCISCO BAY AREA

County of Practice	Frequency
Alameda	7
Contra Costa	3
Marin	1
Napa	0
San Francisco	4
San Mateo	0
Santa Clara	6
Santa Cruz	1
Solano	1
TOTAL	23

SAN JOAQUIN VALLEY

County of Practice	Frequency
Fresno	5
Kern	2
Kings	0
Madera	0
Merced	0
San Joaquin	2
Stanislaus	1
Tulare	0
TOTAL	10

SHASTA-CASCADE

County of Practice	Frequency
Plumas	0
Shasta	1
Tehama	0
TOTAL	1

SIERRA MOUNTAIN VALLEY

County of Practice	Frequency
El Dorado	1
Nevada	0
Placer	2
Tuolumne	0
TOTAL	3

SOUTH COAST AND CENTRAL COAST

County of Practice	Frequency
Monterey	3
San Benito	0
San Luis Obispo	1
Santa Barbara	1
Ventura	3
TOTAL	8

APPENDIX B | CRITICALITY INDICES FOR ALL TASKS BY CONTENT AREA

Content Area 1: MANAGEMENT OF BUSINESS OPERATIONS

Subarea 1A: Scope of Work and Contracts

Task Statement	Frequency	Importance	Criticality
T1. Assess client security needs to determine scope of work.	3.85	4.16	17.05
T2. Prepare breakdown of costs to provide clients with estimate of fees for security services.	3.52	3.84	15.03
T3. Develop contracts to specify details of security services.	3.67	4.05	16.40
T4. Evaluate parameters of security services contract to determine whether subcontracts can be used.	1.85	2.11	6.12

Subarea 1B: Business Practices

Task Statement	Frequency	Importance	Criticality
T5. Manage business practices to comply with requirements regarding PPO organization operations.	4.11	4.38	18.88
T6. Obtain insurance to comply with liability requirements for injury, death, or property damage.	3.94	4.54	18.56
T7. Oversee development of marketing materials to ensure conformance with advertisement requirements.	2.84	3.17	10.93
T8. Maintain security contract records to comply with record-keeping best practices.	4.05	4.18	17.82
T9. Confirm billable time records to invoice clients for security services.	4.03	4.25	18.43

Content Area 2: MANAGEMENT OF SECURITY PERSONNEL

Subarea 2A: Employment Obligations

Task Statement	Frequency	Importance	Criticality
T10. Screen applicants to verify qualifications of security guards or security patrolpersons.	4.07	4.40	18.51
T11. Perform applicant background checks to identify convictions or pending charges that would prohibit applicant from working as a security guard or patrolperson.	3.58	4.27	16.23
T12. Provide payment to security guards and patrolpersons to compensate services rendered.	4.12	4.50	19.46
T13. Maintain personnel records to address employment and termination documentation requirements.	3.97	4.40	18.10
T14. Maintain records of employee certifications and training to document qualifications of security officers and patrolpersons.	4.10	4.43	18.49

Subarea 2B: Verification of Training and Certificates

Task Statement	Frequency	Importance	Criticality
T15. Evaluate employee's completion of security officer skills training to promote the safety of persons and property.	3.77	4.21	16.29
T16. Evaluate compliance with Power to Arrest training to establish employee awareness of professional responsibilities and limitations.	3.83	4.24	16.76
T17. Verify proficiency with firearms or other weapons to determine current qualifications of employee.	2.94	3.85	12.90
T18. Certify proofs of registration to ensure security personnel remain current.	3.98	4.43	17.89
T19. Provide annual practice or review with registered employees to promote security officer skills.	3.42	3.98	14.21

Content Area 3: MANAGEMENT OF SECURITY OPERATIONS

Subarea 3A: Security Assignments and Professional Obligations

Task Statement	Frequency	Importance	Criticality
T20. Develop post orders to specify details of security assignments.	3.68	4.19	15.92
T21. Develop safety guidelines to protect employees and the public during security assignments.	3.78	4.18	16.35
T22. Review responsibilities and limitations with security personnel to reinforce adherence during assignments.	3.67	4.13	15.74
T23. Review responsibilities and limitations of the use of force to reinforce adherence during private security assignments.	3.74	4.35	16.72
T24. Provide uniforms and equipment to identify personnel as private security during assignments.	3.73	4.20	16.56
T25. Maintain professional integrity when managing security operations to uphold trust in the profession.	4.31	4.59	20.21

Subarea 3B: Incident Management and Reporting Obligations

Task Statement	Frequency	Importance	Criticality
T26. Monitor employee conduct to identify violations of the qualifications, functions, and duties of the profession.	3.86	4.27	16.82
T27. Review work activity reports to identify incidents that require additional action or training.	3.76	4.13	16.02
T28. Report discharge of firearms or use of other weapons during security assignments to notify BSIS of circumstances surrounding incidents.	1.68	4.18	7.78
T29. Report physical altercations that occur during security assignments to alert BSIS of circumstances surrounding injury or arrest.	2.07	4.34	9.30
T30. Report unlicensed or unregistered private security activity to notify BSIS of violations.	1.87	4.02	8.06

APPENDIX C | KNOWLEDGE IMPORTANCE RATINGS BY CONTENT AREA

Content Area 1: MANAGEMENT OF BUSINESS OPERATIONS

Subarea 1A: Scope of Work and Contracts

	Knowledge Statement	Importance
K1.	Knowledge of laws related to providing private security services.	3.70
K2.	Knowledge of methods for evaluating security needs of potential clients.	3.32
K3.	Knowledge of criteria for providing executive protection, standing guard, or vehicle patrol service.	3.44
K4.	Knowledge of requirements for using active law enforcement as personnel in private security assignments.	2.96
K5.	Knowledge of laws related to providing cost estimates for proposed security services.	3.06
K6.	Knowledge of methods for developing budgets for proposed security services.	3.08
K7.	Knowledge of laws related to contracting with clients for private security services.	3.31
K8.	Knowledge of methods for developing scope of work and costs contract provisions.	3.13
K9.	Knowledge of laws related to use of subcontractors in security details.	2.85

Content Area 1: MANAGEMENT OF BUSINESS OPERATIONS, continued

Subarea 1B: Business Practices

	Knowledge Statement	Importance
K10.	Knowledge of laws regarding PPO qualified manager obligations.	3.59
K11.	Knowledge of laws regarding PPO business entities and structures.	3.41
K12.	Knowledge of laws regarding fictitious business name requirements.	2.96
K13.	Knowledge of laws regarding out-of-state security organizations operating in California.	2.49
K14.	Knowledge of laws regarding general liability insurance coverage requirements for private security services.	3.47
K15.	Knowledge of laws regarding insurance documentation and submission requirements.	3.44
K16.	Knowledge of laws regarding advertising or soliciting security business services.	2.92
K17.	Knowledge of laws regarding record-keeping of private security services provided.	3.34
K18.	Knowledge of requirements regarding potential BSIS records audits.	3.36
K19.	Knowledge of methods for managing billable time records.	3.22
K20.	Knowledge of laws pertaining to fraudulent billing practices.	3.24

Content Area 2: MANAGEMENT OF SECURITY PERSONNEL

Subarea 2A: Employment Obligations

	Knowledge Statement	Importance
K21.	Knowledge of laws regarding interviewing security guards and patrolpersons.	3.16
K22.	Knowledge of laws regarding security personnel training and qualification requirements.	3.43
K23.	Knowledge of laws prohibiting discriminatory hiring practices.	3.45
K24.	Knowledge of methods for verifying licenses, permits, and credentials of potential security personnel.	3.44
K25.	Knowledge of laws regarding criminal offenses and private security employment.	3.40
K26.	Knowledge of laws regarding Live Scan for security personnel.	3.09
K27.	Knowledge of methods for conducting background checks of potential security personnel.	3.16
K28.	Knowledge of methods for identifying fraudulent documentation.	3.26
K29.	Knowledge of requirements for notifying BSIS of fraudulent information or documentation.	3.21
K30.	Knowledge of laws regarding employee wages, breaks, and other forms of compensation.	3.59
K31.	Knowledge of laws regarding paid time off and unpaid leave requirements.	3.40
K32.	Knowledge of laws regarding record-keeping and retention of employee personnel records.	3.37
K33.	Knowledge of laws regarding confidentiality of employee personnel files.	3.47
K34.	Knowledge of laws regarding disclosure of or access to employee personnel files.	3.42
K35.	Knowledge of laws regarding BSIS audits of personnel files.	3.38
K36.	Knowledge of laws regarding the maintenance of security personnel certifications.	3.39

NOTE: Shaded knowledge statement was removed by SMEs because it was no longer applicable to practice. See Chapter 4.

Content Area 2: MANAGEMENT OF SECURITY PERSONNEL, continued

Subarea 2B: Verification of Training and Certificates

	Knowledge Statement	Importance
K37.	Knowledge of competency components associated with security officer skills training program.	3.18
K38.	Knowledge of the relationship between security officer training and public protection.	3.20
K39.	Knowledge of the elements of penal codes and their enforcement.	3.07
K40.	Knowledge of responsibilities associated with making a citizen's arrest.	3.51
K41.	Knowledge of the relationship between a security guard and peace officer in making an arrest.	3.49
K42.	Knowledge of limitations of security guard or patrolperson Power to Arrest.	3.57
K43.	Knowledge of restrictions associated with security guard searches and seizures.	3.51
K44.	Knowledge of types of liabilities associated with Power to Arrest.	3.55
K45.	Knowledge of laws regarding trespassing by security detail.	3.41
K46.	Knowledge of requirements regarding security guard training in Power to Arrest.	3.48
K47.	Knowledge of methods for training security guards in Power to Arrest provisions.	3.39
K48.	Knowledge of requirement for providing security guards with Power to Arrest guidebook.	3.30
K49.	Knowledge of laws related to less-lethal weapons certification and use.	3.28
K50.	Knowledge of laws related to baton license and use.	3.16
K51.	Knowledge of laws related to firearms license and use of deadly force.	3.38
K52.	Knowledge of methods for evaluating employee competence in the use of firearms or other weapons.	3.33
K53.	Knowledge of laws related to the certification of verifying registrations and certifications of personnel.*	3.31
K54.	Knowledge of laws related to firearms records retention.	3.16
K55.	Knowledge of laws related to continuing education requirements for security personnel.	3.18
K56.	Knowledge of methods for performing annual skills evaluations of security personnel.	3.14

*NOTE: The SMEs in the August 2021 workshop added the word "verifying" to K53 to clarify the PPO-QM's role of verifying registrations and certifications.

Content Area 3: MANAGEMENT OF SECURITY OPERATIONS

Subarea 3A: Security Assignments and Professional Obligations

	Knowledge Statement	Importance
K57.	Knowledge of components that should be included in post orders.	4.04
K58.	Knowledge of methods for developing workforce instructions.	4.01
K59.	Knowledge of protocols for managing emergency situations.	4.36
K60.	Knowledge of methods for monitoring adherence to operating procedures and duties.	4.22
K61.	Knowledge of procedures for security personnel post-incident reporting.	4.31
K62.	Knowledge of methods for resolving or following up on reported post incidents.	4.22
K63.	Knowledge of requirements related to supervision of personnel at security assignments.	4.20
K64.	Knowledge of laws regarding Cal OSHA requirements.*	4.31
K65.	Knowledge of protocols for managing hazardous materials.	4.03
K66.	Knowledge of methods for promoting employee and public safety on security assignments.	4.17
K67.	Knowledge of laws regarding level of authority of security guards and private patrolpersons.	4.34
K68.	Knowledge of laws regarding false arrest, detainment, and confinement.	4.44
K69.	Knowledge of methods for training personnel in the rights, obligations, and restrictions of private security details.	4.27
K70.	Knowledge of laws regarding use of force and deadly force during security assignments.	4.53
K71.	Knowledge of principles of de-escalation of force.	4.45
K72.	Knowledge of laws regarding possession and carrying of firearms and other weapons in private security assignments.	4.40
K73.	Knowledge of standards regarding criminal and civil liability associated with use of force.	4.45
K74.	Knowledge of principles of firearms safety and weapons handling during security assignments.	4.27
K75.	Knowledge of laws regarding design and use of security guard uniforms, badges, and patches.	4.25
K76.	Knowledge of methods for obtaining BSIS approval for security guard uniforms and badges.	4.20
K77.	Knowledge of laws regarding use of motorized vehicles in security assignments.	3.85

*NOTE: The SMEs in the August 2021 workshop omitted “Cal” to incorporate both California and national OSHA standards. See Chapter 4.

Content Area 3: MANAGEMENT OF SECURITY OPERATIONS, continued

Subarea 3B: Incident Management and Reporting Obligations

	Knowledge Statement	Importance
K78.	Knowledge of laws regarding scope of practice.	4.18
K79.	Knowledge of laws regarding unprofessional conduct.	4.18
K80.	Knowledge of laws regarding scope of practice of security personnel.	4.18
K81.	Knowledge of laws regarding discrimination in the workplace.	4.35
K82.	Knowledge of types of incidents that indicate need for additional training of security personnel.	4.20
K83.	Knowledge of methods for training security personnel in private security detail procedures.	4.11
K84.	Knowledge of laws regarding reporting of firearms discharge or use of other weapons.	4.35
K85.	Knowledge of types of information to include on Incident Report to BSIS.	4.30
K86.	Knowledge of requirements for submitting Incident Reports within specified time frame.	4.26
K87.	Knowledge of laws regarding the reporting of physical altercations.	4.31
K88.	Knowledge of types of unlicensed or unregistered activity in private security industry.	4.15
K89.	Knowledge of requirements for submitting unlicensed and unregistered activity lead forms.	4.09

APPENDIX D | QUESTIONNAIRE EMAIL INVITATION



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Message from the Bureau of Security and Investigative Services

Dear Private Patrol Operator Qualified Manager:

Thank you for opening this online survey. You have been selected to participate in an occupational analysis of the private patrol operator qualified manager profession by the Bureau of Security and Investigative Services (BSIS). BSIS is collecting information on the tasks currently performed by private patrol operator qualified managers in California, the importance of the tasks, and the knowledge needed to perform the tasks safely and effectively. We will use this information to ensure that the private patrol operator qualified manager examination reflects current practice in California.

We worked with a group of private patrol operator qualified managers to develop a survey to capture this information. The survey should take less than an hour to complete.

For your convenience, you do not have to complete the survey in a single session. You can resume where you stopped as long as you reopen the survey from the same computer and use the same web browser. Before you exit, complete the page that you are on. The program will save responses only on completed pages. The weblink is available 24 hours a day, 7 days a week.

Your responses will be kept confidential. They will not be tied to your license or personal information. Individual responses will be combined with responses from other private patrol operator qualified managers, and only group data will be analyzed.

If you have any questions or need assistance with the survey, please contact Brian Knox with the Office of Professional Examination Services at Brian.knox@dca.ca.gov.

To begin the survey, click "**Next**". Please submit the completed survey by **August 15, 2021**.

We welcome your feedback and appreciate your time!

Thank you!

Bureau of Security and Investigative Services

APPENDIX E | QUESTIONNAIRE



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Message from the Bureau of Security and Investigative Services

Dear Private Patrol Operator Qualified Manager:

Thank you for opening this online survey. You have been selected to participate in a study of the private patrol operator qualified manager profession by the Bureau of Security and Investigative Services (BSIS). BSIS is collecting information on the tasks performed by private patrol operator qualified managers in California, the importance of the tasks, and the knowledge needed to perform the tasks safely and effectively. We will use this information to ensure the private patrol operator qualified manager examination reflects current practice in California.

We worked with a group of private patrol operator qualified managers to develop a survey to capture this information. The survey should take less than an hour to complete.

For your convenience, you do not have to complete the survey in a single session. You can pick up where you left off as long as you reopen the survey from the same computer and use the same web browser. Before you exit, complete the page that you are on. The program will save responses only on completed pages. The weblink is available 24 hours a day, 7 days a week.

Your responses will be kept confidential. They will not be tied to your license or personal information. Individual responses will be combined with responses from other private patrol operator qualified managers, and only group data will be analyzed.

If you have any questions or need assistance with the survey, please contact Brian Knox with the Office of Professional Examination Services at Brian.knox@dca.ca.gov.

To begin the survey, click "**Next**". Please submit the completed survey by **August 15, 2021**.

We welcome your feedback and appreciate your time!

Thank you!

Bureau of Security and Investigative Services



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part I - Personal Data

Complete this survey only if you are currently a qualified manager for a private patrol operator and are working in California.

The BSIS recognizes that every qualified manager may not perform all of the tasks and use all of the knowledge contained in this survey. However, your participation is essential to the success of this study, and your contributions will help establish standards for safe and effective private patrol operator qualified manager practice in the State of California.

The information you provide here is voluntary and confidential. It will be treated as personal information subject to the Information Practices Act (Civil Code section 1798 et seq.) and will be used only for the purpose of analyzing the data from this survey to generate a demographic profile of qualified managers practicing in California.

*** 1. Are you currently working as a licensed private patrol operator qualified manager (PPO-QM) in California?**

- Yes
- No



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part I - Personal Data

2. How long have you been a PPO-QM?

- Less than a year
- 1–5 years
- 6–10 years
- 11–15 years
- 16–20 years
- More than 20 years

3. What is the highest level of education you have achieved?

- High school diploma / GED
- Associate degree
- Bachelor's degree
- Master's degree
- Doctorate
- Other (please specify)

4. Which of the following types of employment best describes your work before qualifying for a California PPO-QM license?

- Security guard
- Law enforcement
- Military
- Proprietary or in-house security

5. What other California state-issued licenses or permits do you currently hold? (Check all that apply.)

- None
- Alarm Company Operator
- Private Investigator
- Private Patrol Operator
- Exposed Firearms Permit
- Training instructor, baton
- Training instructor, firearms
- Other (please specify)



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part I - Personal Data

6. How many hours per week do you work as a PPO-QM?

- 10 hours or fewer
- 11–20 hours
- 21–30 hours
- 31–40 hours
- More than 40 hours

7. How is your private patrol operator business structured?

- Corporation
- Partnership
- Sole proprietorship

8. Which of the following types of security services does your business provide?

- Alarm Response
- Armed Courier
- Armed Security
- Events Security
- Executive Protection
- Loss Prevention
- Security Consultant
- Standing Guard
- Vehicle patrol
- Video Surveillance Monitoring
- Vehicle patrol
- Other (please specify)

9. How many part-time employees are in your PPO organization?

- None
- 1–25 employees
- 26–50 employees
- 51–75 employees
- 76–100 employees
- 101–300 employees
- Over 300 employees

10. How many full-time employees are in your PPO organization?

- None
- 1–25 employees
- 26–50 employees
- 51–75 employees
- 76–100 employees
- 101–300 employees
- Over 300 employees

11. Which of the following types of training does your PPO provide in-house? Check all that apply, if any.

- None
- Baton training
- Chemical weapons training
- Defensive tactics / Arrest control
- Firearms training
- Less-lethal weapons training
- Powers to arrest / WMD
- Security guard skills training (AB 2880)
- Other (please specify)

12. Which of the following types of training does your PPO acquire from outside training facilities? Check all that apply, if any.

- None
- Baton training
- Chemical weapons training
- Defensive tactics / Arrest control
- Firearms training
- Less-lethal weapons training
- Powers to arrest/ WMD
- Security guard skills training (AB 2880)
- Other (please specify)

13. What is the location of your primary work setting?

- Urban (more than 50,000 people)
- Rural (fewer than 50,000 people)



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part I - Personal Data

14. In what California county do you perform the majority of your work?

- | | | |
|------------------------------------|---------------------------------------|-------------------------------------|
| <input type="radio"/> Alameda | <input type="radio"/> Marin | <input type="radio"/> San Mateo |
| <input type="radio"/> Alpine | <input type="radio"/> Mariposa | <input type="radio"/> Santa Barbara |
| <input type="radio"/> Amador | <input type="radio"/> Mendocino | <input type="radio"/> Santa Clara |
| <input type="radio"/> Butte | <input type="radio"/> Merced | <input type="radio"/> Santa Cruz |
| <input type="radio"/> Calaveras | <input type="radio"/> Modoc | <input type="radio"/> Shasta |
| <input type="radio"/> Colusa | <input type="radio"/> Mono | <input type="radio"/> Sierra |
| <input type="radio"/> Contra Costa | <input type="radio"/> Monterey | <input type="radio"/> Siskiyou |
| <input type="radio"/> Del Norte | <input type="radio"/> Napa | <input type="radio"/> Solano |
| <input type="radio"/> El Dorado | <input type="radio"/> Nevada | <input type="radio"/> Sonoma |
| <input type="radio"/> Fresno | <input type="radio"/> Orange | <input type="radio"/> Stanislaus |
| <input type="radio"/> Glenn | <input type="radio"/> Placer | <input type="radio"/> Sutter |
| <input type="radio"/> Humboldt | <input type="radio"/> Plumas | <input type="radio"/> Tehama |
| <input type="radio"/> Imperial | <input type="radio"/> Riverside | <input type="radio"/> Trinity |
| <input type="radio"/> Inyo | <input type="radio"/> Sacramento | <input type="radio"/> Tulare |
| <input type="radio"/> Kern | <input type="radio"/> San Benito | <input type="radio"/> Tuolumne |
| <input type="radio"/> Kings | <input type="radio"/> San Bernardino | <input type="radio"/> Ventura |
| <input type="radio"/> Lake | <input type="radio"/> San Diego | <input type="radio"/> Yolo |
| <input type="radio"/> Lassen | <input type="radio"/> San Francisco | <input type="radio"/> Yuba |
| <input type="radio"/> Los Angeles | <input type="radio"/> San Joaquin | |
| <input type="radio"/> Madera | <input type="radio"/> San Luis Obispo | |



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part II - Task Ratings

INSTRUCTIONS FOR RATING TASK STATEMENTS

In this part of the questionnaire, you will be presented with 30 task statements. Please rate each task as it relates to your current practice as a private patrol operator qualified manager using the **Frequency** and **Importance** scales displayed below. Your frequency and importance ratings should be separate and independent ratings. Therefore, the ratings you assign using one rating scale should not influence the ratings that you assign using the other rating scale.

If the task is NOT a part of your current practice, rate the task as "0" (zero) frequency and "0" (zero) importance.

The boxes for rating the frequency and importance of each task have drop-down lists. Click on the "down" arrow for each list to see the rating, and then select the value based on your current practice.

FREQUENCY RATING SCALE

HOW OFTEN are these tasks performed in your current practice? Use the following scale to make your ratings.

0 - DOES NOT APPLY. I do not perform this task in my current practice.

1 - RARELY. This task is one of the tasks I perform least often in my current practice relative to other tasks I perform.

2 - SELDOM. This task is performed less often than most to other tasks I perform in my current practice.

3 - REGULARLY. This task is performed as often as other tasks I perform in my current practice.

4 - OFTEN. This task is performed more often than most other tasks I perform in my current practice.

5 - VERY OFTEN. This task is one of the tasks I perform most often in my current practice relative to other tasks I perform.

IMPORTANCE RATING SCALE

HOW IMPORTANT are these tasks in performance of your current practice? Use the following scale to make your ratings.

0 - NOT IMPORTANT, DOES NOT APPLY TO MY PRACTICE. This task is not important to my current practice; I do not perform this task in my practice.

1 - OF MINOR IMPORTANCE. This task is of minor importance relative to other tasks; it has the lowest priority of all the tasks I perform in my current practice.

2 - FAIRLY IMPORTANT. This task is fairly important relative to other tasks; however, it does not have the priority of most other tasks I perform in my current practice.

3 - MODERATELY IMPORTANT. This task is moderately important for effective performance relative to other tasks; it has average priority of all the tasks I perform in my current practice.

4 - VERY IMPORTANT. This task is very important relative to other tasks; it has a higher degree of priority than most other tasks I perform in my current practice.

5 - CRITICALLY IMPORTANT. This task is one of the most critical tasks I perform relative to other tasks; it has the highest degree of priority of all the tasks I perform in my current practice.



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part II - Task Ratings

15. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current practice (Importance).

Content Area 1: Management of Business Operations

Scope of Work and Contracts

	Frequency	Importance
T1. Assess client security needs to determine scope of work.	<input type="text"/>	<input type="text"/>
T2. Prepare breakdown of costs to provide clients with estimate of fees for security services.	<input type="text"/>	<input type="text"/>
T3. Develop contracts to specify details of security services.	<input type="text"/>	<input type="text"/>
T4. Evaluate parameters of security services contract to determine whether subcontracts can be used.	<input type="text"/>	<input type="text"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part II - Task Ratings

16. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current practice (Importance).

Content Area 1: Management of Business Operations

Business Practices

	Frequency	Importance
T5. Manage business practices to comply with requirements regarding PPO organization operations.	<input type="text"/>	<input type="text"/>
T6. Obtain insurance to comply with liability requirements for injury, death, or property damage.	<input type="text"/>	<input type="text"/>
T7. Oversee development of marketing materials to ensure conformance with advertisement requirements.	<input type="text"/>	<input type="text"/>
T8. Maintain security contract records to comply with recordkeeping best practices.	<input type="text"/>	<input type="text"/>
T9. Confirm billable time records to invoice clients for security services.	<input type="text"/>	<input type="text"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part II - Task Ratings

17. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current practice (Importance).

Content Area 2: Management of Security Personnel

Employment Obligations

	Frequency	Importance
T10. Screen applicants to verify qualifications of security guards or security patrolpersons.	<input type="text"/>	<input type="text"/>
T11. Perform applicant background checks to identify convictions or pending charges that would prohibit applicant from working as a security guard or patrolperson.	<input type="text"/>	<input type="text"/>
T12. Provide payment to security guards and patrolpersons to compensate services rendered.	<input type="text"/>	<input type="text"/>
T13. Maintain personnel records to address employment and termination documentation requirements.	<input type="text"/>	<input type="text"/>
T14. Maintain records of employee certifications and training to document qualifications of security officers and patrolpersons.	<input type="text"/>	<input type="text"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part II - Task Ratings

18. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current practice (Importance).

Content Area 2: Management of Security Personnel

Verifications of Training and Certifications

	Frequency	Importance
T15. Evaluate employee's completion of security officer skills training to promote the safety of persons and property.	<input type="text"/>	<input type="text"/>
T16. Evaluate compliance with Power to Arrest training to establish employee awareness of professional responsibilities and limitations.	<input type="text"/>	<input type="text"/>
T17. Verify proficiency with firearms or other weapons to determine current qualifications of employee.	<input type="text"/>	<input type="text"/>
T18. Certify proofs of registration to ensure security personnel remain current.	<input type="text"/>	<input type="text"/>
T19. Provide annual practice or review with registered employees to promote security officer skills.	<input type="text"/>	<input type="text"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part II - Task Ratings

19. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current practice (Importance).

Content Area 3: Management of Security Operations

Security Assignments and Professional Obligations

	Frequency	Importance
T20. Develop post orders to specify details of security assignments.	<input type="text"/>	<input type="text"/>
T21. Develop safety guidelines to protect employees and the public during security assignments.	<input type="text"/>	<input type="text"/>
T22. Review responsibilities and limitations with security personnel to reinforce adherence during assignments.	<input type="text"/>	<input type="text"/>
T23. Review responsibilities and limitations of the use of force to reinforce adherence during private security assignments.	<input type="text"/>	<input type="text"/>
T24. Provide uniforms and equipment to identify personnel as private security during assignments.	<input type="text"/>	<input type="text"/>
T25. Maintain professional integrity when managing security operations to uphold trust in the profession.	<input type="text"/>	<input type="text"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part II - Task Ratings

20. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current practice (Importance).

Content Area 3: Management of Security Operations

Incident Management and Reporting Obligations

	Frequency	Importance
T26. Monitor employee conduct to identify violations of the qualifications, functions, and duties of the profession.	<input type="text"/>	<input type="text"/>
T27. Review work activity reports to identify incidents that require additional action or training.	<input type="text"/>	<input type="text"/>
T28. Report discharge of firearms or use of other weapons during security assignments to notify BSIS of circumstances surrounding incidents.	<input type="text"/>	<input type="text"/>
T29. Report physical altercations that occur during security assignments to alert BSIS of circumstances surrounding injury or arrest.	<input type="text"/>	<input type="text"/>
T30. Report unlicensed or unregistered private security activity to notify BSIS of violations.	<input type="text"/>	<input type="text"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part III - Knowledge Ratings

INSTRUCTIONS FOR RATING KNOWLEDGE STATEMENTS

In this part of the questionnaire, you will be presented 89 knowledge statements. Please rate each knowledge statement based on how important you believe that knowledge is to the effective performance of tasks in your current practice as a private patrol operator qualified manager.

If the knowledge does **NOT** apply to your practice, rate the statement as "0" (zero) importance and go on to the next statement.

Please use the following importance scale to rate the knowledge statements:

IMPORTANCE SCALE

HOW IMPORTANT is this knowledge for effective performance of tasks in your current practice?

0 - NOT IMPORTANT; NOT REQUIRED. This knowledge does not apply to my current practice; it is not required for effective performance.

1 - OF MINOR IMPORTANCE. This knowledge is of minor importance for effective performance; it is useful for some relatively minor parts of my current practice.

2 - FAIRLY IMPORTANT. This knowledge is fairly important for effective performance in some relatively major parts of my current practice.

3 - MODERATELY IMPORTANT. This knowledge is moderately important for effective performance in some relatively major parts of my current practice.

4 - VERY IMPORTANT. This knowledge is very important for effective performance of tasks in my current practice.

5 - CRITICALLY IMPORTANT. This knowledge is critically important for effective performance of tasks in my current practice.



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

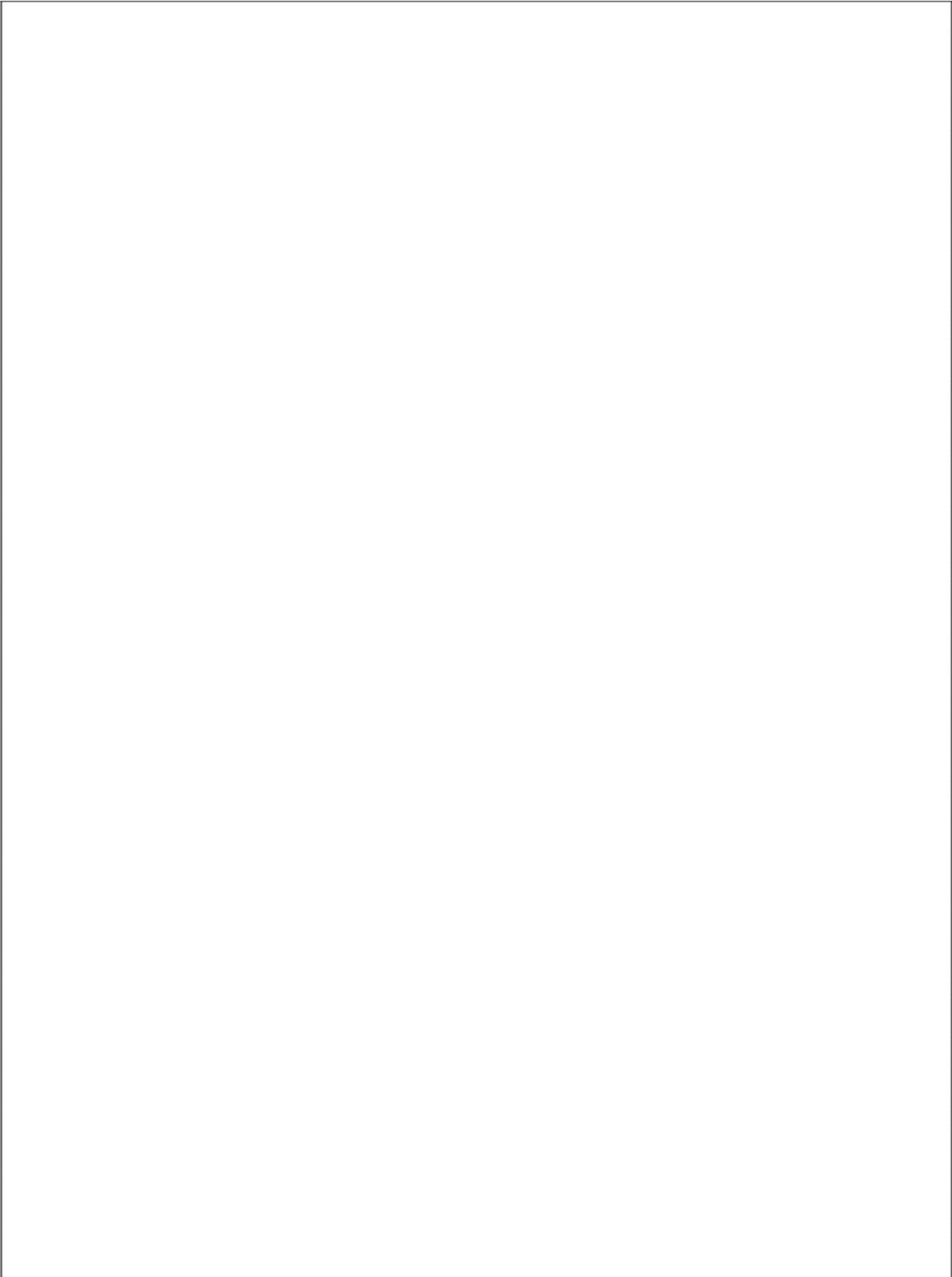
Part III - Knowledge Ratings

21. How important is this knowledge for effective performance of tasks in your current practice?

Content Area 1: Management of Business Operations

Scope of Work and Contracts

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K1. Knowledge of laws related to providing private security services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K2. Knowledge of methods for evaluating security needs of potential clients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K3. Knowledge of criteria for providing executive protection, standing guard, or vehicle patrol service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K4. Knowledge of requirements for using active law enforcement as personnel in private security assignments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K5. Knowledge of laws related to providing cost estimates for proposed security services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K6. Knowledge of methods for developing budgets for proposed security services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K7. Knowledge of laws related to contracting with clients for private security services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K8. Knowledge of methods for developing scope of work and costs contract provisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K9. Knowledge of laws related to use of subcontractors in security details.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>





PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part III - Knowledge Ratings

22. How important is this knowledge for effective performance of tasks in your current practice?

Content Area 1: Management of Business Operations

Business Practices

	Not important, not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K10. Knowledge of laws regarding PPO qualified manager obligations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K11. Knowledge of laws regarding PPO business entities and structures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K12. Knowledge of laws regarding fictitious business name requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K13. Knowledge of laws regarding out-of-state security organizations operating in California.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K14. Knowledge of laws regarding general liability insurance coverage requirements for private security services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K15. Knowledge of laws regarding insurance documentation and submission requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K16. Knowledge of laws regarding advertising or soliciting security business services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K17. Knowledge of laws regarding recordkeeping of private security services provided.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K18. Knowledge of requirements regarding potential BSIS records audits.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K19. Knowledge of methods for managing billable time records.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K20. Knowledge of laws pertaining to fraudulent billing practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part III - Knowledge Ratings

23. How important is this knowledge for effective performance of tasks in your current practice?

Content Area 2: Management of Security Personnel

Employment Obligations

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K21. Knowledge of laws regarding interviewing security guards and patrolpersons.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K22. Knowledge of laws regarding security personnel training and qualification requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K23. Knowledge of laws prohibiting discriminatory hiring practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K24. Knowledge of methods for verifying licenses, permits, and credentials of potential security personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K25. Knowledge of laws regarding criminal offenses and private security employment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K26. Knowledge of laws regarding Live Scan for security personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K27. Knowledge of methods for conducting background checks of potential security personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K28. Knowledge of methods for identifying fraudulent documentation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K29. Knowledge of requirements for notifying BSIS of fraudulent information or documentation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K30. Knowledge of laws regarding employee wages, breaks, and other forms of compensation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K31. Knowledge of laws regarding paid time off and unpaid leave requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K32. Knowledge of laws regarding recordkeeping and retention of employee personnel records.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K33. Knowledge of laws regarding confidentiality of employee personnel files.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K34. Knowledge of laws regarding disclosure of or access to employee personnel files.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K35. Knowledge of laws regarding BSIS audits of personnel files.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K36. Knowledge of laws regarding the maintenance of security personnel certifications.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part III - Knowledge Ratings

24. How important is this knowledge for effective performance of tasks in your current practice?

Content Area 2: Management of Security Personnel

Verifications of Training and Certifications

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K37. Knowledge of competency components associated with security officer skills training program.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K38. Knowledge of the relationship between security officer training and public protection.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K39. Knowledge of the elements of penal codes and their enforcement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K40. Knowledge of responsibilities associated with making a citizen's arrest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K41. Knowledge of the relationship between a security guard and peace officer in making an arrest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K42. Knowledge of limitations of security guard or patrolperson power to arrest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K43. Knowledge of restrictions associated with security guard searches and seizures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K44. Knowledge of types of liabilities associated with power to arrest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K45. Knowledge of laws regarding trespassing by security detail.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K46. Knowledge of requirements regarding security guard training in Power to Arrest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K47. Knowledge of methods for training security guards in Power to Arrest provisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K48. Knowledge of requirement for providing security guards with Power to Arrest guidebook.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K49. Knowledge of laws related to less-lethal weapons certification and use.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K50. Knowledge of laws related to baton license and use.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K51. Knowledge of laws related to firearms license and use of deadly force.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K52. Knowledge of methods for evaluating employee competence in the use of firearms or other weapons.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K53. Knowledge of laws related to the certification of registrations of personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K54. Knowledge of laws related to firearms records retention.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K55. Knowledge of laws related to continuing education requirements for security personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K56. Knowledge of methods for performing annual skills evaluations of security personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part III - Knowledge Ratings

25. How important is this knowledge for effective performance of tasks in your current practice?

Content Area 3: Management of Security Operations

Security Assignments and Professional Obligations

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically Important
K57. Knowledge of components that should be included in post orders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K58. Knowledge of methods for developing workforce instructions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K59. Knowledge of protocols for managing emergency situations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K60. Knowledge of methods for monitoring adherence to operating procedures and duties.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K61. Knowledge of procedures for security personnel post-incident reporting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically Important
K62. Knowledge of methods for resolving or following up on reported post incidents.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K63. Knowledge of requirements related to supervision of personnel at security assignments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K64. Knowledge of laws regarding Cal/OSHA requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K65. Knowledge of protocols for managing hazardous materials.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K66. Knowledge of methods for promoting employee and public safety on security assignments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K67. Knowledge of laws regarding level of authority of security guards and private patrolpersons.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K68. Knowledge of laws regarding false arrest, detainment, and confinement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K69. Knowledge of methods for training personnel in the rights, obligations, and restrictions of private security details.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically Important
K70. Knowledge of laws regarding use of force and deadly force during security assignments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K71. Knowledge of principles of de-escalation of force.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K72. Knowledge of laws regarding possession and carrying of firearms and other weapons in private security assignments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K73. Knowledge of standards regarding criminal and civil liability associated with use of force.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K74. Knowledge of principles of firearms safety and weapons handling during security assignments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K75. Knowledge of laws regarding design and use of security guard uniforms, badges, and patches.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K76. Knowledge of methods for obtaining BSIS approval for security guard uniforms and badges.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K77. Knowledge of laws regarding use of motorized vehicles in security assignments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K78. Knowledge of laws regarding scope of practice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically Important
K79. Knowledge of laws regarding unprofessional conduct.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Part III - Knowledge Ratings

26. How important is this knowledge for effective performance of tasks in your current practice?

Content Area 3: Management of Security Operations

Incident Management and Reporting Obligations

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K80. Knowledge of laws regarding scope of practice of security personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K81. Knowledge of laws regarding discrimination in the workplace.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K82. Knowledge of types of incidents that indicate need for additional training of security personnel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K83. Knowledge of methods for training security personnel in private security detail procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Not important; not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K84. Knowledge of laws regarding reporting of firearms discharge or use of other weapons.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K85. Knowledge of types of information to include on Incident Report to BSIS.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K86. Knowledge of requirements for submitting Incident Reports within specified time frame.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K87. Knowledge of laws regarding the reporting of physical altercations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K88. Knowledge of types of unlicensed or unregistered activity in private security industry.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K89. Knowledge of requirements for submitting unlicensed and unregistered activity lead forms.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



PRIVATE PATROL OPERATOR QUALIFIED MANAGER OCCUPATIONAL ANALYSIS SURVEY

Thank you!

Thank you for taking the time to complete this survey. The Bureau of Security and Investigative Services (BSIS) values your contribution to this study.