

# The Merit System



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2008 Annual Report

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The Personnel Board of Jefferson County

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## Table of Contents

OVERVIEW .....	5
History of the Personnel Board of Jefferson County .....	5
Citizens Supervisory Commission (CSC) .....	5
Three-Member Board .....	9
Continuing Role of the Monitor .....	10
Motion to Terminate Consent Decree .....	10
Three-Member Board Appeals .....	11
Personnel Board of Jefferson County Services .....	11
Rules and Regulations.....	11
PBJC’s Service Functions .....	12
Staffing .....	14
ADMINISTRATION .....	15
FINANCIAL REPORT .....	26
WORKFORCE DEVELOPMENT & APPLICANT SERVICES .....	30
Applicant Services .....	32
Recruiting .....	34
PERFORMANCE MEASUREMENT .....	36
TRAINING & CAREER DEVELOPMENT .....	52
CLASSIFICATION AND COMPENSATION .....	57
EMPLOYEE RELATIONS .....	61
RECORDS MANAGEMENT.....	64
INFORMATION TECHNOLOGY .....	67
DATA MANAGEMENT .....	72



Report Period  
November 1, 2007 – October 31, 2008



## **OVERVIEW**

### **History of the Personnel Board of Jefferson County**

The Personnel Board of Jefferson County (PBJC) was established in 1935 by state statute as the human resources agency responsible for administering the civil service system in Jefferson County. PBJC is responsible for recruiting and assessing candidates for employment, creating hiring registers and for referring qualified candidates to hiring departments throughout the County. PBJC also performs other traditional HR activities such as classification and compensation, employee relations, and records management. The governing statute, more commonly known as the Enabling Act, sets forth the authority for and the regulations under which a county's Civil Service (Merit) System operates in the State of Alabama. The Act applies to all counties in the state with four-hundred thousand (400,000) or more inhabitants. Currently, this includes Jefferson and Mobile counties. Within counties having multiple municipalities, such as Jefferson, the Merit System is inclusive of municipalities having five thousand (5,000) or more inhabitants and whose borders lie geographically within the county. Police Officers of municipalities having two-thousand five hundred (2,500) inhabitants are also statutorily included. For purposes of inclusion, the population of the counties and their respective municipalities is counted as of the last official federal census.

Currently, employees of eighteen (18) municipalities throughout Jefferson County are part of the Merit System. These eighteen municipalities, together with several countywide entities such as The Jefferson County Department of Health, The Emergency Management Agency (EMA), the Jefferson County Commission, Judges, and the Personnel Board itself make up the twenty-three "jurisdictions" that are part of the Merit System of Jefferson County. There are approximately nine-thousand (9,000) employees throughout the twenty-three jurisdictions. All employees of covered municipalities and the other defined countywide entities are automatically covered by the Merit System unless they are statutorily exempt. Some of the classifications exempted by statute are: employees or appointees of the city or county Board of Education, teachers in public schools, elected officials, the judge of any court, resident physicians, and common laborers.

### **Citizens Supervisory Commission (CSC)**

The Personnel Board of Jefferson County is an independent agency within the County and is not a part of any political, county, or municipal subdivision within the System. The Board reports to a Citizens' Supervisory Commission (CSC) comprised of seventeen (17) community leaders, including heads of local colleges, universities, and civic groups. The current CSC members are listed below.

**CITIZENS SUPERVISORY COMMISSION**  
**November 2007**

<p>Judge Alan King Probate Judge, Chairman 120-1 Jefferson County Courthouse 716 Richard Arrington Blvd. North Birmingham, AL 35203</p> <p>325-5203 214-4056 (FAX) <a href="mailto:kinga@jccal.org">kinga@jccal.org</a></p>	<p>Sgt. Cecil Tidmore County Employee Representative Jefferson County Sheriff's Department 1923 Rock Spring Road Warrior, AL 35180</p> <p>647-5336 <a href="mailto:tidmorec@jccal.org">tidmorec@jccal.org</a></p>
<p>Dr. Thomas A. Westmoreland President Samford University 800 Lakeshore Drive Birmingham, AL 35209</p> <p>726-2011 726-2061 (FAX) <a href="mailto:tawestmo@samford.edu">tawestmo@samford.edu</a></p> <p>Rebecca Williamson (Assistant) <a href="mailto:rswillia@samford.edu">rswillia@samford.edu</a></p>	<p>Kirk Patrick President Jefferson County Labor Council 1128 Hardwick Lane Birmingham, AL 35209</p> <p>942-8203 <a href="mailto:patrickk@usa.redcross.org">patrickk@usa.redcross.org</a></p>
<p>Russell Cunningham President Chamber of Commerce 505 North 20th St., Ste. 200 Birmingham, AL 35203</p> <p>324-2100 (Ext. 8100) 324-2317 (Fax) <a href="mailto:russelc@birminghamchamber.com">russelc@birminghamchamber.com</a></p>	<p>David Pollick President Birmingham Southern College P.O. Box 9002 900 Arkadelphia Road Birmingham, AL 35254</p> <p>226-4600 OR 226-4620 226-7020 (Fax) <a href="mailto:pollick@bsc.edu">pollick@bsc.edu</a></p>

<p>Ms. Carolyn Harper Chairperson Birmingham Urban League</p> <p>Honda Manufacturing of Alabama LLC 1229 3<sup>rd</sup> Avenue North Birmingham, AL 35203 355-5000 (Ext 3135)</p> <p><a href="mailto:carolyn_harper@ham.honda.com">carolyn_harper@ham.honda.com</a></p>	<p>Rev. Steve Small, Jr. President Interdenominational Minister's Alliance of Greater Birmingham 1801 Biko Place Birmingham, AL 35211</p> <p>250-7070</p>
<p>Dr. Carol Garrison University of Alabama at Birmingham President AB1070 – 1530 3rd Avenue South Birmingham, AL 35294-1150</p> <p>934-4636 975-8505 (Fax) <a href="mailto:cgarrison@uab.edu">cgarrison@uab.edu</a></p>	<p>Donna McCurry President Jefferson County Council of PTAs 6820 Candlewood Lane Clay, AL 35173</p> <p>or 2100 18<sup>th</sup> Street South Birmingham, AL 35209</p> <p>655-1498 <a href="mailto:dnajo@charter.net">dnajo@charter.net</a></p>
<p>Hezekiah Jackson President N. A. A. C. P. Metro Birmingham Branch 805 Old Forest Road Birmingham, AL 35243</p> <p>849-9676 <a href="mailto:answerhjacks@hotmail.com">answerhjacks@hotmail.com</a></p>	<p>Dr. George T. French, Jr. President Miles College P. O. Box 3800 Birmingham, AL 35208</p> <p>929-1428 923-1426 (Fax) <a href="mailto:GTFrench@aol.com">GTFrench@aol.com</a></p>

<p>Dr. David S. McKee, Jr.  President  Jefferson County Medical Society  2660 10th Avenue South  Birmingham, AL 35205</p> <p>933-8601  939-0680 (Fax)  <a href="mailto:pcpra@nephrologypc.com">pcpra@nephrologypc.com</a>  or Martha Waters Wise, Executive  Director</p>	<p>Dr. Perry W. Ward  President  Lawson State Community College  3060 Wilson Road Southwest  Birmingham, AL 35221</p> <p>925-2515 (Ext. 302)  923-1649  <a href="mailto:pward@lawsonstate.edu">pward@lawsonstate.edu</a></p>
<p>Dr. Judy M. Merritt  President  Jefferson State Junior College  2601 Carson Road  Birmingham, AL 35215</p> <p>853-1200  856-1764 (Fax)  <a href="mailto:jmerritt@jeffstateonline.com">jmerritt@jeffstateonline.com</a></p>	<p>Lt. Jerry R. Mahaffey  Hueytown Fire Department  201 Mabelon Court  Hueytown, AL 35023</p> <p>744-2470  <a href="mailto:budgie491@charter.net">budgie491@charter.net</a></p>

The Citizens' Supervisory Commission must have nine members present at their meetings in order to conduct business. The Bessemer Women & Youth Association is no longer in existence.

## Three-Member Board

The PBJC is governed by a Three-Member Board. Board members are appointed by the CSC and serve staggered six-year terms. The current PBJC Board Members are as follows:

Place #1 Alfred "Buddy" F. Smith Bainbridge, Mims, Rogers & Smith LLP The Luckie Building Suite 415 600 Luckie Drive Birmingham, Alabama 35253	Chairperson (205) 879-1100 (205) 879-4300 (fax) <a href="mailto:asmith@bainbridgemims.com">asmith@bainbridgemims.com</a>	Term Expires 2010
Place #2 Judge L. Kenneth Moore PO Box 396 Bessemer, Alabama 35201-0000	Associate 426-1111 425-1676 (Fax) <a href="mailto:wareaglelkm@gmail.com">wareaglelkm@gmail.com</a>	Term Expires 2009
Place #3 Ann Florie 4244 Caldwell Mill Road Birmingham, Alabama 35243	Associate (205) 969-1732 <a href="mailto:annflb@bellsouth.net">annflb@bellsouth.net</a>	Term Expires 2013

## **Continuing Role of the Monitor**

On November 15, 2005, the Court issued an order appointing Dr. William Sauser, Jr. of Auburn University as the Court's Monitor "to oversee the efforts of the Personnel Board to comply with its obligations under its 1981 consent decree, as modified in 1995, and extended in December of 2000, and, to assist this court and the parties in determining the Board's ability and commitment to function in compliance with Federal law absent judicial supervision."

The court further specified in part that:

- The Monitor, as an agent of the court, is independent of the parties and under the direct control and supervision of the court.
- The Monitor has no authority to intervene in the administrative management of the Personnel Board.
- The Monitor has the responsibility of investigating facts that may bear on the Personnel Board's compliance with its obligations under the consent decree, or on the Personnel Board's ability and commitment to function in compliance with Federal law absent judicial supervision.

The Monitor continues to function in this capacity and to make regular reports to the Court as required.

## **Motion to Terminate Consent Decree**

On December 19, 2007, the Personnel Board filed a Motion for Final Relief from its long-standing consent decree calling for the court to release the Board from judicial supervision and for the agency to be returned to the local officials charged by state law with the administration of public employment in Jefferson County. In its filing, the Board reiterated with the court that the agency has demonstrated its firm commitment to compliance with federal law by implementing the personnel, policies, and resources necessary to fulfill its mission. Not only has the PBJC satisfied the requirements set forth in Supreme Court and Eleventh Circuit precedents for relief from remedial and consent decrees, it has transformed "into a strong and competent civil service agency with a clearly defined mission, the infrastructure, systems and skills to support that mission, and an agency that discharges all functions in an efficient, professional, and cost-effective manner in substantial compliance with all applicable federal and state law and regulations." As of this writing, the Personnel Board is awaiting a ruling by Judge Lynwood Smith.

## Three-Member Board Appeals

The Three-Member Board has continued to actively review employee disciplinary appeals arising from decisions of hearing officers and other employee-related matters subject to a Board hearing. Since the November 2007 CSC meeting, the Three-Member Board has decided 45 disciplinary cases, 2 grievances, 7 paid injury leave appeals, and 0 citizen's complains.

## Personnel Board of Jefferson County Services

The PBJC provides a variety of human resource related services to the jurisdictions within the Merit System. Services provided by the Board include:

- **Facilitating the hiring of qualified individuals to fill vacancies within the jurisdictions.** The responsibility of the Personnel Board is to manage job requisitions, recruit, accept and screen applicants, test qualified applicants, and send names of qualified applicants who pass job related, legally defensible tests to the employers within the Merit System.
- **Managing and administering job classifications and salary structures across the jurisdictions.** The responsibility of the Personnel Board is to survey and develop class specifications via job evaluations and analyses, conduct salary surveys, establish compensation plans and salary schedules, and address position and salary management requests throughout the jurisdictions.
- **Managing and maintaining employee history.** The responsibility of the Personnel Board is to maintain the civil service record of employment for all employees under the Merit System. This includes employee set up upon hiring, administration of employee changes such as promotions, leaves of absence, merit increases, job classification changes, and voluntary or involuntary separation.
- **Managing and facilitating employee relations and employee training and development.** The responsibility of the Personnel Board is to mediate employee appeals or grievances and to otherwise assure that Merit System employees have a mechanism to secure rights granted them under the Act. It is further the responsibility of the Board to provide learning opportunities that facilitate the careers of Merit System employees.

## Rules and Regulations

The Personnel Board of Jefferson County was established by the Enabling Act as the administrative body responsible for governing the County's Merit System, for providing human resource services to member jurisdictions, and for assuring compliance with the requirements contained within the Act. Compliance is accomplished through a set of Rules and Regulations promulgated from the Act. These Rules and Regulations serve as the administrative and procedural

guidelines applicable and adhered to by all Merit System jurisdictions and their respective employees.

As provided for in §12 of the Act, it is the responsibility of the Personnel Board to establish rules and regulations necessary for administering a scientific and economical personnel system. Such rules and regulations, when approved by two-thirds of the 3-Member Board, “have the force and effect of law...”

A copy of the current Personnel Board Rules and Regulations may be obtained from the PBJC website at: <http://www.pbjcal.org/RulesRegsApril2005.pdf>

The Board has initiated a process to review the Rules and Regulations, which were last published in April 2005, for possible revision. In so doing, the Board is interested in gathering input from a broad constituency. For the period beginning October 19, 2007, and ending January 11, 2008, the Board invited Appointing Authorities, Classified Employees, and the general public to comment on and provide suggestions regarding revisions to the Rules and Regulations. On October 20, 2008, the Board published proposed modifications to the Rules and Regulations and again opened them for public comment. The comment period runs through close of business November 20, 2008. A Public Hearing is scheduled for December 2, 2008.

## **PBJC’s Service Functions**

**Administration** provides oversight for all areas, departments, and functions within the Personnel Board of Jefferson County. It is responsible for the equitable application and execution of the Rules and Regulations, for protecting the interests of civil service employees throughout Jefferson County, for establishing and maintaining positive and productive relationships with member jurisdictions, and for the proper management of the Board's assets.

**Workforce Development and Applicant Services** encourages applicants for employment to consider careers in civil service and markets Jefferson County as an employer of choice in the greater Birmingham area. The department advertises job vacancies utilizing a variety of media to attract a broad and diverse pool of qualified candidates for open positions within the Jefferson County Merit System and strives to establish a presence in the employment community locally, regionally, and nationally through job announcements, attendance at career fairs, recruiting at high schools, colleges and universities, special recruiting events, and by participation in professional and civic organizations. Workforce Development and Applicant Services works with member jurisdictions to develop and execute recruitment strategies and to identify quality candidates for employment. In addition, Workforce Development is responsible for processing Requests for Certification for all types of appointments, providing certification lists to hiring jurisdictions, and certifying payrolls.

**Performance Measurement** is responsible for the development, validation, administration, and certification of all entry level and promotional selection procedures within the Merit System. This includes conducting job analyses, developing selection measures that comply with federal guidelines on employee selection procedures, administering and scoring tests, establishing registers and notifying candidates of their eligibility status.

**Training and Career Development** is all about learning. The Department offers Merit System employees access to courses and classes to positively affect their careers and to exceed expectations of citizens they serve. Classes include training in computer software, human relations, effective customer service and management and leadership.

**Compensation and Classification** is responsible for establishing job classes for all Merit System jobs, assuring that employees are properly assigned to classes, and that classes are appropriately assigned to salary grades. C & C reviews Position Description Questionnaires (PDQs), conducts job audits, develops classification specifications, and collects and analyzes labor market data to assure the competitive positioning of Merit System jobs. It is the objective of the Compensation and Classification Department to create and maintain a compensation and classification system that fosters career growth and is both externally competitive with regard to relevant labor markets and equitable internally.

**Employee Relations** is responsible for providing information, guidance, and instruction to employees, elected officials, department heads, attorneys, and the citizenry concerning Personnel Board Rules and Regulations pertaining to disciplinary appeals, grievances, paid injury leave appeals, citizen's complaints, administrative leave, leaves of absence, fitness for duty examinations, reduction in force, military leave, and performance appraisals.

**Records Management** serves as the central operations unit and point of contact for the processing of all Merit System personnel actions, including, but not limited to, hires, transfers, promotions, status changes, salary adjustments, premiums, leaves of absences, and terminations and is responsible for managing all Merit System employee personnel records.

**Information Technology** provides the infrastructure and support for all of the information network and data reporting and analysis needs of the Personnel Board and provides technical assistance to jurisdictions using the PBJC online information systems.

## Staffing

### Employees Hired November 1, 2007 – October 31, 2008

Carlos Kyle	Employee Relations Team Lead
Andrea Salazar	Intern
Ross Scruggs	Intern

### Employees Promoted November 1, 2007 – October 31, 2008

Becky Lopez	Examination and Certification Assistant
Adrienne Wormley	Examination and Certification Assistant

### Employees Separated from the Board November 1, 2007 – October 31, 2008

Blair Davis	Assessment and Development Specialist
Randall Fields	Employee Relations Team Lead
Alicia Henson	Assessment and Development Specialist
Divya Keshavan	Assessment and Development Specialist
Sara Lucius	Assessment and Development Specialist
Marcus Maddox	PC Network Technician
Mary Stowe Rigrish	Assessment and Development Specialist
Andrea Salazar	Intern
Ross Scruggs	Intern
Lisa Tarvin	Assessment and Development Specialist
Connie Warren	Administrative Assistant I

# ADMINISTRATION

## Overview

Administration provides oversight for all areas, departments, and functions within the Personnel Board of Jefferson County.

Administration is responsible for:

- Ensuring compliance with the Rules and Regulations
- Clarifying personnel policy issues
- Creating policies and procedures to assist in the operation of the organization
- Managing daily operations of the departments
- Developing and monitoring annual budgets

## Activities and Accomplishments

The Personnel Board of Jefferson County is committed to establishing a standard of excellence in service to its member jurisdictions and to the greater Birmingham community and to becoming an agency recognized for professionalism, expertise, and integrity. To this end, in September 2005, the Personnel Board adopted seven organizational principles by which it would operate. These principles serve as benchmarks against which the organization's success can be measured. Following are representative activities engaged in by the Personnel Board of Jefferson County during the report year that demonstrate its commitment to these principles and progress toward its goals.

### **Maintain the highest professional, ethical and legal standards in all our activities.**

Personnel Director, Lorren Oliver, was selected as the 2008 recipient of The Greater Birmingham Chapter of the American Society for Public Administrators (ASPA) as the Administrator of the Year. ASPA is an organization that is committed to the advancement of excellence in the public service. Each year the chapter presents its Administrator of the Year Award at its Annual Meeting to a public service practitioner whose career exhibits the highest standards of excellence, dedication, and accomplishment. Mr. Oliver was presented the award at the ASPA Annual Meeting and Awards Luncheon on Friday, April 25, 2008. In addition, he was featured in the August, 2008 issue of the American Society for Public Administrator's publication, *PA Times*, highlighting his designation as Administrator of the Year.

The Board's Performance Measurement Division was awarded the *Innovations in Assessment Award* by the International Public Management Association Assessment Council (IPMAAC) for its innovative use of video and audio technology in assessment practices, for its commitment to individualized assessment and higher-fidelity testing, and the development and implementation of the PBJC video-based assessment center facility.

The Personnel Board is committed to providing training and career development opportunities to its staff, including its leadership team. The *PBJC Supervisory Certificate Program* provides a foundation of supervisory knowledge and skills applicable to a broad range of positions. Core management principles and practices are woven through the curriculum and courses include "Delegating Authority", "Managing Employee Conflict", "Managing Change", "Coaching for Success", "Avoiding Legal Landmines", "Customer Service Basics", "Workplace Harassment", "Effective Teams", "Essential Leadership Skills", "Giving and Receiving Feedback", "Listening for Understanding", "Merit System Rules and Regulations", "The Supervisor's Job", and two electives. Because the Board believes it is essential that its management team exemplifies the skills, traits and behaviors of successful leaders, all Personnel Board supervisors and managers are currently enrolled in or have completed the certificate program. On October 29, 2008, eleven PBJC supervisors and managers were formally recognized for having completed the program's requirements.

The Board has added a new training course available to Merit System employees – Building and Keeping the Public Trust. This course is designed to heighten the awareness of Merit System employees' roles as public servants accountable to citizens and taxpayers and to foster service excellence in government.

On October 13, 2008, all Board staff participated in an in-service training day designed to build teamwork and enhance internal communications. Rather than observe Columbus Day as a holiday, Board staff gathered at the McWayne Center for a day of team building exercises and personal and professional interaction.

Continuous learning is an important goal for all Personnel Board staff and is viewed as a critical success factor in serving the Board's customers. To this end, a number of staff attended professional conferences and workshops, including the following:

- 23<sup>rd</sup> Annual Society for Industrial/Organizational Psychology (SIOP) Conference
- Annual Conference of the International Public Management Association – Assessment Council (IPMAAC)
- Society for Human Resource Management (SHRM) Annual Conference
- Lawson Users' Conference
- PeopleAdmin Users' Conference

- EEOC Training Institute's Technical Assistance Program
- WorldatWork's Regulatory Environments for Compensation Programs

In addition, employee development is encouraged through internally developed continuing education meetings, outside training initiatives, and research, presentation, and publication opportunities.

To assure that the Board is reaching out to a broad and diverse population of applicants, recruitment marketing strategies have been utilized using media formats that are representative of the community. High-quality marketing materials advance diversity and inclusion through the use of diverse images and voice talent. In addition, recruitment personnel attend a variety of activities and events in the community to ensure diversity and inclusion while striving to identify the best qualified candidates for job classes.

Included as part of the Board's diversity outreach are people with disabilities. In February, the Board approved a special procedure to certify qualified people with significant disabilities to hiring jurisdictions. This procedure allows the names of people with disabilities who have been certified by the Alabama Department of Rehabilitation Services or the U. S. Department of Veteran Affairs as significantly disabled and who have qualified for placement on a register to be added to certification lists, as additions to the top ten certified ranks. In addition, the Board's websites have been modified to be more readable by people with visual disabilities.

Assuring that individuals assigned to the unclassified service of any jurisdiction are not performing duties that otherwise should be performed within the Classified Service is an important function of the Personnel Board. To this end, Board staff interviewed laborers in the City of Bessemer, Jefferson County and the City of Birmingham. The objective of the review was to validate the jurisdictions' use of laborers by identifying major tasks being performed. To the extent that any of the individuals were found to be performing classified work, the Board is working with the jurisdictions to take corrective action.

**Respond to service requests and inquiries in a timely, efficient, and competent manner.**

Creating registers quickly without compromising the integrity of the testing process is a strategic imperative of the Board. To accomplish this, new and more efficient test development methodologies have been implemented. The Board has moved to a job family based approach to analyzing jobs in order to improve the efficiency of the process, reduce the amount of time jurisdictions' staff members are required to commit to providing subject matter expertise in the job analysis process, and create greater consistency in the analysis and qualifications for related job classes.

The Board has completed the development of a web-based Job Analysis Questionnaire (JAQ). The web-based JAQ will make subject matter expert participation in the job analysis process more convenient and improve the efficiency and accuracy of the data collection and analysis process. The online JAQ will also allow for easier data sharing among the departments within the PBJC.

While the creation of registers in a timely manner is an important goal, providing lists of candidates from those registers to hiring jurisdictions quickly is equally important. Where a register exists, the goal of the Board remains to provide lists to jurisdictions within one business day. For the report period, lists have been provided, on average, in .14 days.

The Board utilizes its state-of-the-art systems to monitor work requests and output and to provide data useful in identifying operating efficiencies. New reports continue to be added to the management dashboard. The Board's data reporting and analysis capability has allowed it to measure productivity, target processes needing improvement, implement efficiencies, and respond to massive requests for information from the consent decree parties in a timely, comprehensive, and paperless manner. The Board is in the process of developing a web-based Business Information Center to make important management information available to Appointing Authorities on demand.

### **Keep the human resource needs of the jurisdictions central.**

In order to provide the Appointing Authorities with an overview of the information needed to perform human resources functions associated with civil service employment in Jefferson County as governed by the 1945 Enabling Act of the State of Alabama, an instruction booklet, *An Overview of Civil Service Employment*, was created and distributed to the Appointing Authorities in January 2007. The document was not intended to be an exhaustive discussion of or to otherwise be instructive with regard to all of the rules, regulations, policies or operating procedures that govern or are utilized to execute actions in the Merit System of Jefferson County. The appointing authorities, as well as Merit System employees and the public can find comprehensive information on the Board's website, [www.pbjcal.org](http://www.pbjcal.org).

The Rules and Regulations serve as the basis of the Board's governance of the Merit System and are written to execute the mandates of the Enabling Act. The Rules are subject to periodic review to ensure that they are meeting the needs of both employees and appointing authorities. The current Rules were published in April, 2005. From October 19, 2007, through January 11, 2008, the Board invited appointing authorities, Merit System employees and the general public to comment on the Rules and to submit suggestions for change. There were 111 responses. Proposed modifications are, as of this writing, open for public

comment. A public hearing on the proposed modifications is scheduled for December 2, 2008.

The timely establishment of eligible registers is core to the success of the PBJC and the Merit System as a whole; thus, developing and administering selection procedures in order to establish quality registers in a timely fashion remains at the forefront of the Board's goals and mission. Since the 2007 annual report, 258 eligible registers have been released. In addition to these 258 registers, up to date job analyses have been conducted for 120 jobs.

Maintaining up-to-date registers for public safety positions has been a top priority for the PBJC. During the period covered by this report, the PBJC has released registers for Police Officer/Deputy Sheriff, Firefighter, Police/Sheriff Sergeant, Police/Sheriff Lieutenant, Police/Sheriff Captain, Police Chief I, II, and III, Fire Chief I, II, and III, Fire Battalion Chief II, and Fire Apparatus Operator.

Furthermore, in August, 2007, in order to assure a steady supply of qualified public safety personnel to the jurisdictions, the Board began recruiting Police Officer applicants on an open/continuous basis. Police Officer examinations are administered monthly, providing that no individual may sit for an examination more than once in a twelve-month period.

**Ensure efficient utilization and judicious accountability of all resources within our control.**

As part of the Board's continuing commitment to being a conscientious steward of public resources, department managers are strictly accountable for the expenditures in their respective areas and receive monthly financial statements to review. Monthly financial updates, as well as bi-weekly expenditure reports are also presented by the Business Officer to the Three-Member Board during the Board meetings.

The Board's Business Officer attended the Institute of Management Accountants (IMA) 89th Annual Conference & Exposition in June 2008. The conference included critical issues most relevant to accounting and finance professionals such as strategic planning, budgeting, forecasting, financial leadership and ethics. The conference provided insight on various changes in the accounting and financial industry. Additionally, the Accounting Assistant attended a two-day seminar on Payroll Management and the Family Medical Leave Act (FMLA) in August 2008.

The Board continues to utilize a zero-based budgeting process. This approach requires managers annually to justify and document the need for the monies requested in their budgets for each line item. Zero-based budgeting means that each department cannot assume that they will receive the same funding that they were given in the previous year and there are no automatic rollover assumptions.

Each year, departments start with zero dollars and for all dollars requested there must be both justification and goals associated with the funds request. Once the budget is final and has been approved by the Three-Member Board, it is distributed to the appointing authorities and posted on the Board's website for full transparency.

In July 2007, the Jefferson County Commission converted to a new financial system (SAP). Since the Personnel Board utilizes the County's purchasing and payroll systems, the Business Officer and support staff attended several training classes in order to obtain assistance in processing purchase requests and gain additional information regarding the features of the new system. The Board worked in conjunction with the Jefferson County Purchasing Department to expedite the processing of purchase order requests, supply orders and payments to vendors.

In order to ensure efficient use of public funds and to ensure the Personnel Board receives the lowest price for services provided, several bid proposals were submitted to interested vendors related to travel management services and transcription services. The bids were awarded to the lowest bidder and annual contracts were established.

In order to eliminate some \$9,500 in annual costs associated with storing aged documents at the Jefferson County warehouse, in April, the Personnel Board implemented a process of reviewing boxes of warehoused files for possible destruction. The process is being carried out in accordance with the State of Alabama's record retention/destruction guidelines.

Recognizing that the agency's operations are funded by its member jurisdictions, the Board is equally committed to identifying and reducing unnecessary costs and to increasing the efficiency of its operations to the extent possible. Since the height of the receivership, the Board's budget has declined significantly and the FY2008-2009 budget represents the Board's fourth sequential declining budget.

The Board continues to aggressively monitor its finances and protect its physical assets through internal financial controls, annual inventory auditing and operating policies and procedures that direct the use of Board resources. As testimony to the Board's diligence, the actual expenditures of the Board for FY2005-2006 were \$1,581,364.13 less than budget, for FY2006-2007 the actual expenditures were \$1,111,694.37 less than budget, and for FY2007-2008, the actual expenditures are estimated to be \$1.2 million less than budget (unadjusted as of the report date).

Additionally, new policies were developed for employee mileage reimbursement and record retention and destruction. Other Board operating policies were updated and revised as necessary.

The Personnel Board relies heavily on qualified individuals from outside the Merit System to serve as volunteers to assist in assessing various high-fidelity examinations administered by the PBJC. To reduce the costs associated with recruiting and training these volunteer assessors the Board has completed the development of a Personnel Board Assessor Training Certificate program. The certificate program will not only ensure the volunteers are thoroughly trained, but will also reduce costs associated with the recruitment process and lodging of the assessors by encouraging repeat volunteers and reducing training time.

To assure that advertising and recruitment dollars are spent in the most productive manner, applicant source data is reviewed at three stages of the application life cycle – application, register, and hire. The collected data is used to make decisions regarding the allocation of funds to the most effective sources. In addition, recruitment personnel regularly collaborate with hiring managers and monitor employment market and industry research results to develop and implement strategies that result in the most effective recruitment of applicants for difficult/specialized openings.

**Communicate in an open, honest, respectful and positive manner with each other and with our stakeholders.**

At the end of each fiscal year Jefferson County routinely calculates the Personnel Board's expenditures, allocates the expenditures based on the proportional number of classified employees on each jurisdiction's payroll as of September 30th, and submits this information to the Personnel Director for certification. Once the expenditures have been certified by the Director, Jefferson County submits invoices to the jurisdictions for their portion owed. As of January 1, 2008, The Personnel Board had not received the expenditure information from the County for fiscal years 2006 and 2007 and, consequently, jurisdictions were not billed for these years. The Personnel Director communicated with the chairwoman of the Jefferson County Commission and the Jefferson County Finance Director and corresponded with each jurisdiction to inform them of the Board's concern regarding the implications of this delay on the jurisdictions, particularly should Jefferson County simultaneously invoice for multiple years. As of this writing, Jefferson County has distributed invoices to the jurisdictions for fiscal years 2006 and 2007.

Understanding that the civil service employment process can be somewhat confusing to the general public, a new web-based slide presentation, *What You Should Know: Getting Hired in the Merit System of Jefferson County*, has been developed and added to the JobsQuest web site. This presentation is a simple, straightforward description of the process from application to hire.

As an additional means of sharing information, new applicants are receiving automatic emails thanking them for their application and explaining in detail the hiring process. New employees receive automatic emails welcoming them to the

Merit System and providing them with information regarding services available to them through the Personnel Board.

With the purchase of new mail preparation equipment and new mailing forms, the PBJC has been able to make substantial improvements in the information directly communicated to applicants for employment. The new notices that are sent to all applicants provide information on the civil service hiring process, the process for appealing decisions, staying up to date on the status of an application, and websites and phone numbers that are helpful in the Merit System employment process.

The Performance Measurement Division has focused on increasing communication to jurisdictions regarding the status of Requests for Certification on jobs for which no active register exists. Upon being notified of a need for a certification list, the Performance Measurement Division communicates with the requesting department manager and with the jurisdiction's human resources staff providing the name of the person handling the job analysis and announcement, the projected dates for opening and closing the job announcement, and the projected date by which they should receive a certification list. Such communication helps jurisdictions appropriately plan for filling employment vacancies.

**Find ways to add value and increase the return on investment for all of our stakeholders.**

Data collected regarding sources of applicants reveals that, for the report period, 11.8% of all new hires were referred by existing Merit System employees. Employee referrals are second only to JobsQuest as the highest source of applicants and, consequently, constitute a very important recruitment source. To recognize this and to encourage more referrals, on April 1, 2008, Merit System employees who refer applicants who are subsequently hired receive a free tee-shirt.

The PBJC continuously reviews its work processes and organizational structure to ensure that its operations are optimally efficient, cost effective, and result in the highest quality of work. In 2008, the Board began to shift work processes previously performed in Performance Measurement and Records Management and consolidated them in Workforce Development and Applicant Services. This combines the processes of creating and posting job announcements, recruiting and screening applications, managing registers and issuing certification lists into one seamless operation.

A strategic imperative of the Personnel Board is to market the Merit System of Jefferson County as an employer of choice through the implementation of comprehensive marketing and recruiting strategies that include newsprint, internet postings, event sponsorships, billboards, television, radio, direct mail,

career events, and community outreach events, and direct contact (head hunting); electronic notification of openings to community organizations and churches; and, programs such as Link to Civil Service and Strengthen Educate and Train (SET); Merit Matters monthly newsletter, and the new My Merit Matters web site. Particular emphasis has been placed on branding JobsQuest in the greater Birmingham community through billboard advertising and sponsorship spots on WBHM radio. This has resulted in record visits to the site and assures a steady stream of new applicants for Merit System jobs.

As a means of fostering communications with and between Merit System employees, the Board has designed and developed a new website that promotes the open exchange of ideas and opinions and provides important and heretofore not readily available information of interest to employees. The site was designed based on input obtained from employee focus groups that were held during June, 2007 and has continued to be developed with several new features being added. Most recently, functionality has been added to allow Merit System employees to monitor their ranks on any registers on which their names appear and to see where their names have been certified. The site also allows employees to create and post transfer resumes that can be accessed by jurisdictions seeking candidates for position vacancies. The site was featured in an article in the September edition of *HR News*, a publication of the International Public Management Association (IPMA), on innovative Web 2.0 applications in government.

The Board provides assistance to users of the Board's online systems through a telephone and email help desk. During the 2008 report period, the Board has responded to over twelve thousand requests for functional and technical assistance from Merit System employees and the general public. In addition, Board staff regularly provide on-site classroom and hands-on training when requested by jurisdictions.

The Board has modified CareerZone, its training management website, to allow member jurisdictions to use the site's functionality for managing their own intra-jurisdictional training, rather than purchasing or building their own systems. This is a first step toward offering jurisdictions web services they would otherwise have to purchase externally.

### **Work to increase community awareness of PBJC services and activities.**

Involvement of employees in civic and community affairs and membership in professional associations is encouraged as a means of creating community awareness. During 2008, Board staff raised over \$13,000 for various charitable organizations. As in past years, Board staff actively participated in the Susan G. Komen Breast Cancer Awareness campaign, collecting nearly \$5,000 through various fundraising activities. Stacey Lange, Senior Assessment & Development Specialist in the Performance Measurement Division, received the Coldwater

Creek Spirit of Service Award for her volunteer work. Additionally, Board staff helped raise \$705.00 for the March of Dimes WalkAmerica and \$290 was raised through participation in the Mercedes Walk that supports Autistic and Downs Syndrome children, Kids One Transport, and Children's Hospital. \$7,846 was raised by Board staff for the United Way of Central Alabama.

In addition to monetary support, this year several of the Board staff are partnering with a United Way Agency, Better Basics, to motivate the children at Phillips Academy to read books and reward them for their efforts. PBJC volunteers read to the children, grade book reports or award prizes. The program will last through March of 2009. Performance Measurement staff volunteered time to assist the Birmingham Salvation Army Angel Tree program. Staff members assisted in sorting and distributing donations to local families in need. Raymond Goolsby, Workforce Development and Applicant Services, is a founding member of PROPEL (Providing Resources Opportunity Pride Empowerment and Leadership), a mentoring organization whose purpose is to assist resource-poor communities through community action, spiritual growth, and mentoring.

PBJC staff members are engaged professionally in such organizations as the International Public Management Association (IPMA), the Birmingham Society for Human Resource Management, (BSHRM), the American Psychological Association (APA), the Society for Industrial/Organizational Psychology (SIOP), the American Society for Training and Development (ASTD), the Academy of Management (AOM), the American Society for Public Administration (ASPA) and WorldatWork, a professional organization dedicated to compensation professionals. Involvement in these organizations promotes peer to peer information exchange, provides professional networking opportunities, and helps to educate the business community about the Board and its mission. In addition, PBJC staff members presented symposia, papers, and discussion sessions to communicate information about the PBJC, its functions, and/or research in human resources at local universities and the 2008 conferences for SIOP, IPMAAC, and AOM.

## **Future Plans**

The following are Administration's future plans:

Continue to serve the citizens of Jefferson County, Bessemer, Birmingham, Center Point, Fairfield, Fultondale, Gardendale, Graysville, Homewood, Hueytown, Irondale, Leeds, Midfield, Mountain Brook, Pleasant Grove, Tarrant, Trussville, Vestavia Hills and Warrior by ensuring that the filling of local government jobs is based on merit and ability, and not based on political factors, nepotism, or favoritism.

Continue to serve as conscientious stewards of public resources and ensure the efficient utilization of all resources provided to fund critical initiatives such as recruiting, employee testing, training and development and the overall management of the data and records systems for our 9,000 plus merit system employees.

Develop and institute initiatives to rebuild the image of the Board and foster stronger relationships with employees, departments, and Appointing Authorities.

## **Conclusion**

The Board continues to realize successes and progress toward established goals, such as a reduction in the length of time to turnaround certification lists to hiring jurisdictions; record visits to JobsQuest, the Board's employment website, a result of targeted marketing and recruiting campaigns to brand the Merit System as an employer of choice in Jefferson County; the continued development of internal policies and procedures to ensure integrity and accountability in the operation of the organization; the development of CareerZone, an in-house learning management system that will provide substantial cost savings annually; the development of MyMeritMatters, a website designed to promote cross-jurisdictional, peer-to-peer communications between Merit System employees, the development of training programs targeting special needs within the Merit System, such as SET, a program directed to female applicants for public safety jobs, as well as the development of supervisory and managerial track certification programs.

It is critical that our continued efforts reflect value to the Appointing Authorities, Merit System employees and to the taxpayers of Jefferson County. As we move forward, it is imperative that the Board continue the significant progress made to date, maintain its statutory compliance to avoid future legal entanglements, and work closely with its constituencies to provide services that enhance the Board's value. The Board staff is committed to providing services that are consistent with its seven organizational principles and to identifying programs, initiatives and strategies that will continue to add value to the role of the Board and will advance the purposes of the Civil Service System of Jefferson County.

## FINANCIAL REPORT

### 2007 – 2008 Personnel Board Expenses\*

	<b><u>Personnel Board</u></b>
Salaries	4,245,677.45
FICA, Pension, Health, Life, Unemployment	1,117,893.11
Tuition Refund	2,040.00
Legislated Allowance (payment to board members for monthly meetings, per State Legislation)	2,030.00
Insurance Premiums	35,971.00
Legal (Hearing Officer and legal expenses)	813,054.51
Other Professional Services (Special Master, Court-Appointed Monitor, Consultants, Transcription Services, etc).	275,999.92
IT System Support (Licenses, Maintenance Service Contracts and IT Hosting Application)	636,927.71
Rental Charges for External Test Administration	149,627.03
Office Equipment Rental & Repairs (printers, etc.)	1,786.18
Telephone Service, Cellular Phone Service & Data Lines	15,129.94
Postage & Express Mail	2,213.24
Advertising	252,457.63

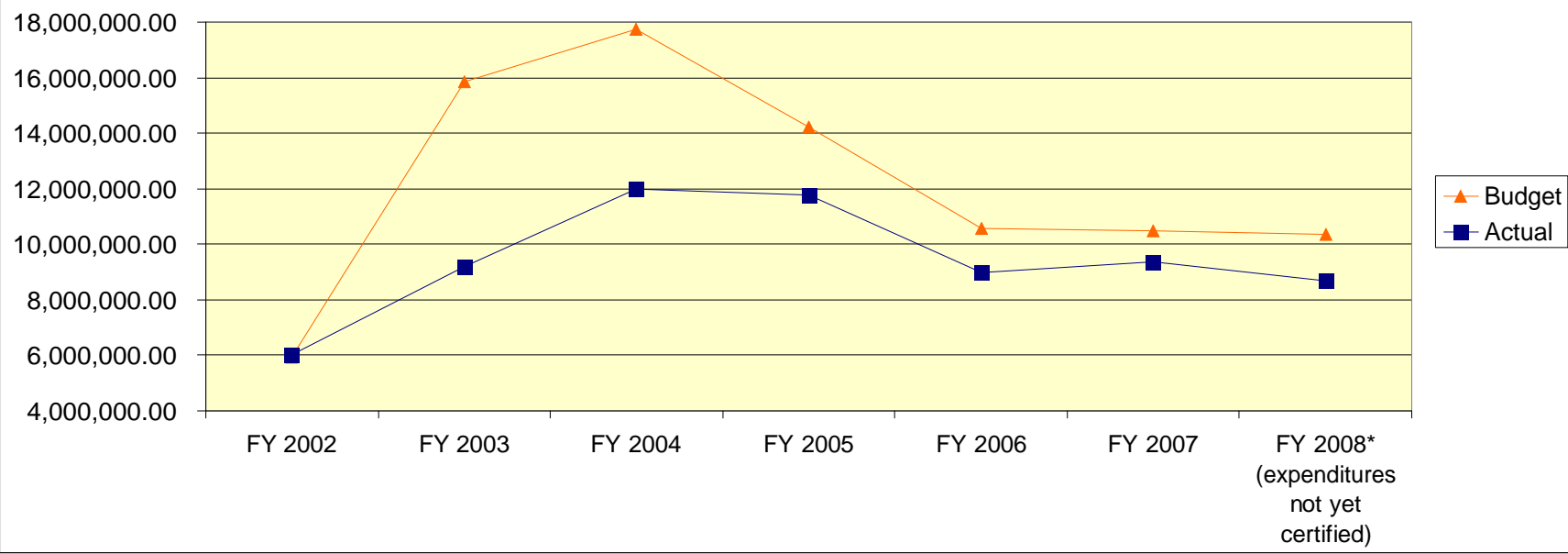
	<b><u>Personnel Board</u></b>
Staff Development	68,033.20
Staff Mileage Reimbursement (travel to jurisdictions, etc.)	1,844.34
Reimbursement for Assessor Travel, Accommodations, & Per Diem-Dinner (assessors volunteer to serve as evaluators for the Testing Process) and travel to Career Events to promote Merit System positions	141,058.89
Books, Periodicals, Membership Dues & Subscriptions (on-line legal subscription, materials for Training classes, etc.)	19,950.15
General Office	40,119.84
Printing & Binding (printing of T-shirts for Merit System referral program and promotional items for Public Safety recruitment campaign)	7,426.30
Lease-Office Equipment (copier rental and maintenance)	19,021.84
Other Technical Materials & Supplies (computers, licenses, IT supplies under \$1,000 and folder/sealer equipment)	66,141.59
Hospitality (breakfast and lunch for assessors who volunteer from public agencies nationwide to serve as evaluators for the Testing Process)	35,554.51
Miscellaneous Equipment (computers and servers over \$1000)	31,656.76
Major Software (licenses over \$1,000)	47,570.01
Furniture (initiative to replace aged County furniture - Phase I)	32,984.67
Jefferson County Archival Charges (document storage fees)	3,172.00

	<b><u>Personnel Board</u></b>
Jefferson County Square Footage (lease of 2121 Building)	635,362.92
Total Expenditures*	<b><u>8,700,704.74</u></b>

	<b><u>Personnel Board</u></b>
Personnel Board Encumbered Balance (outstanding purchase orders as of September 30, 2008)	<b><u>411,355.62</u></b>

- **Information was extracted from the Jefferson County SAP system (JCAL Budget Usage Report as of September 30, 2008). However, end of year accruals and adjustments have not been made yet by Jefferson County. Final expenditures, including adjustments and accruals, will be submitted to the Personnel Board in January, and reviewed and certified by the Personnel Director in the second quarter of 2009.**

**Personnel Board of Jefferson County  
Actual Expenses vs. Approved Budget  
Fiscal Years 2002 - 2008**



## **WORKFORCE DEVELOPMENT & APPLICANT SERVICES**

“Recruiting the Best and the Brightest for Civil Service” is the overall goal of Workforce Development and Applicant Services (WDAS). WDAS recruits for a wide variety of positions for the jurisdictions and municipalities served by The Personnel Board of Jefferson County. These positions include law enforcement, firefighters, court personnel, accountants, attorneys, administrative and office support staff, social workers, utility workers, medical personnel, engineers, information technology specialists, and many, many others. Service to applicants is delivered with an open and personal touch; applicants are welcome to contact members of the department by telephone, email, or in-person. Additionally, kiosks are readily available in the Applicant Services lobby with staff located close by to provide one-on-one assistance, if necessary.

Workforce Development & Applicant Services has eleven FTEs – four Examination and Certification Assistants, two Administrative Assistants; a Recruiting Advisor; two Recruiting Representatives; an Administrative Specialist and a Manager.

### **Goal: Employ a wide-ranging recruiting strategy to match the diversity of positions and jurisdictions served.**

- Newsprint advertising in the Birmingham News, the Birmingham Times, the Wall Street Journal.
- Billboards at high traffic locations.
- Television advertising on Fox6, ABC33/40, and Spanish language cable channels throughout the state of Alabama.
- Radio advertising on WBHM, WJOX, WBHK, WBHJ, and WPSB (Spanish radio).
- Internet postings on Monster.com, International Association of Crime Analysts, Allied Health Careers, Alabama Dietetic Association, Alabama Nurse, International Association of Arborists, Birmingham Society of Human Resource Management, National Society of Human Resource Management, American Society of Training and Development, Alabama Parks and Recreation, National Recreation and Park Association, and Al.com.
- Direct mail marketing.
- Career events at Alabama State University Troy University, University of Alabama at Birmingham, Alpha Phi Sigma (University of Alabama Criminal Justice Majors), Alabama A&M University, Athens State University, Oakwood College, University of Alabama at Huntsville, University of North Alabama, Auburn University, Lawson State Community College, Wallace State Community College, Miles College, Troy University, Gadsden State Community College, Jefferson State Community College, the University of South Alabama, and the Birmingham News.
- Area high school career days and speaking engagements.

- Formal referral program with giveaways.
- Weekly electronic notifications of openings sent to all jurisdictions, area churches with Hispanic ministries, and various community organizations.
- Event sponsorships; Magic City Classic football game and Fiesta festival.

**Goal: Increase number of applicants for Nursing.**

The current recruiting campaign will continue through December 31, 2008. As of October 31, 2008, 331 applicants have applied and had been added to the registers for LPN and Staff Nurse.

The 2007 recruiting campaign for LPN and Staff Nurse produced 262 applicants on registers.

**Goal: Increase number of Hispanic applicants for Nursing.**

The current recruiting campaign will continue through December 31, 2008. As of October 31, 7 Hispanic applicants have applied for LPN or Staff Nurse.

The 2007 recruiting campaign for LPN and Staff Nurse attracted 4 Hispanic applicants.

**Goal: Increase the total number of female applicants for entry-level Public Safety positions 2007 vs. 2008.**

The current recruiting campaign will continue through December 31, 2008. As of October 31, 678 female applicants have applied for Public Safety positions.

The 2007 recruiting campaign attracted 870 female applicants.

**Goal: Increase the total number of Hispanic applicants for entry-level Public Safety positions 2007 vs. 2008.**

The current recruiting campaign will continue through December 31, 2008. As of October 31, 40 Hispanic applicants have applied for Public Safety positions.

The 2007 recruiting campaign attracted 53 Hispanic applicants.

***Certification***

The Examination and Certification Assistants handle the complex operation of screening applications, issuing notices, ranking applicants, establishing registers of applicants, and compiling and issuing certification lists to hiring authorities.

**Goal: Issue certifications in less than one day**

For the last twelve months, certification lists have been produced and issued in less than one day of the request from the jurisdiction. In fact, the staff was able to do this in less than half of a day for several of the months in the reporting period.

## **Applicant Services**

The Applicant Services staff is usually the first contact with the Personnel Board that most individuals experience. Therefore it is critically important that this first impression is positive. The staff field questions for every department at the Personnel Board as well as many that are not Personnel Board-related. In the past twelve months, the staff managed over 25,000 contacts. They are ready to answer or find someone who can answer the many questions they receive. The staff is also responsible for scanning and attaching supplemental documents such as transcripts, resumes, certificates and licenses to applicants' online applications.

The table on the following page provides total monthly customer contact activities and trends from November 1, 2007 through October 31, 2008:

**Customer Contact Activities November 1, 2007 through October 31, 2008**

Activity	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Total
Computer Kiosk Users	255	103	200	276	202	193	255	251	238	257	419	302	2,951
On-site/Remote Online Users Assisted	186	61	120	266	168	148	184	188	127	108	269	106	1,831
General PBJC Inquiries	1,297	1,052	790	1,058	908	834	817	983	1,051	1,057	944	603	11,394
Non PBJC Inquiries	117	82	98	112	112	106	66	90	118	83	69	57	1,110
Transfers/Referrals to PBJC Departments	355	230	598	661	628	517	442	608	429	603	373	210	5,654
IVR Files Processed	3	0	0	0	0	0	0	0	0	0	0	0	3
Emails Processed	165	165	194	168	103	310	179	161	144	261	256	219	2,325
<b>Total Monthly Volume</b>	<b>2,378</b>	<b>1,693</b>	<b>2,000</b>	<b>2,541</b>	<b>2,121</b>	<b>2,108</b>	<b>1,943</b>	<b>2,281</b>	<b>2,107</b>	<b>2,369</b>	<b>2,330</b>	<b>1,497</b>	<b>25,368</b>

## Recruiting

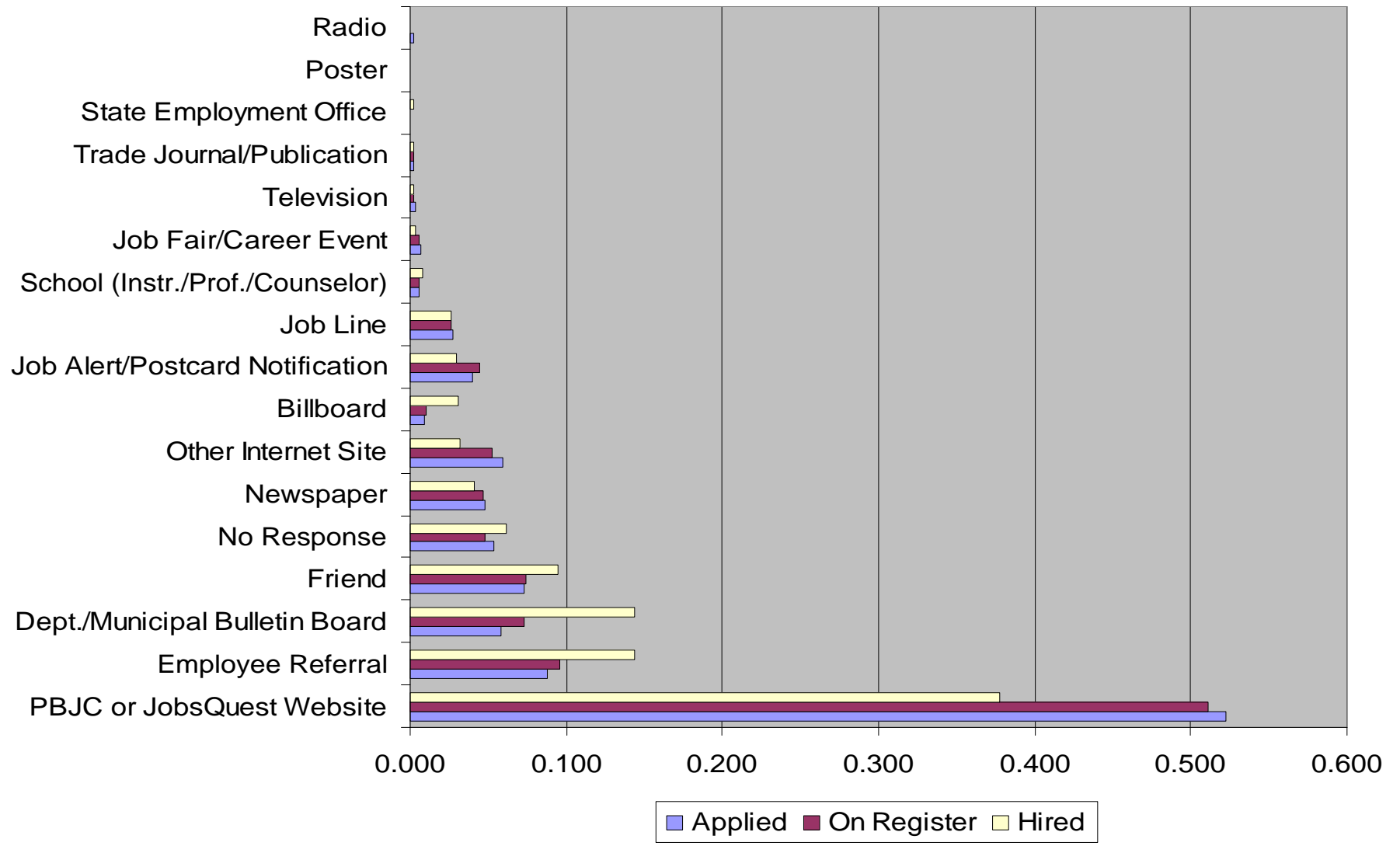
### ***A Comprehensive Approach***

Recruiting for such a wide variety of positions requires a comprehensive strategy to meet the needs of the jurisdictions and to ensure a diverse and qualified pool of applicants. The recruiting staff works to establish, build, and maintain positive relationships with hiring authorities, community leaders, advertising professionals, colleges, and applicants. Current Merit System employees are kept informed of both promotional opportunities as well as open and competitive opportunities through a weekly electronic communication that is sent to all jurisdictions' department heads, hiring and Appointing Authorities, and city clerks. The staff has significantly increased the use of internet postings to both industry specific (niche) web sites as well as a major job board. The staff is also employing a direct contact method of recruiting for positions that require highly skilled and/or experienced candidates. This is being done to meet the needs of the jurisdictions and their changing communities.

The table below and chart on the following page shows a summary and totals for sources for applications, hires, and applicants placed on registers from November 1, 2007 through October 31, 2008.

<b>Answer</b>	<b>Applied</b>	<b>%</b>	<b>On Register</b>	<b>%</b>	<b>Hired</b>	<b>%</b>
PBJC or JobsQuest Website	13467	0.523	5821	0.511	568	0.377
Employee Referral	2250	0.087	1092	0.096	217	0.144
Dept./Municipal Bulletin Board	1494	0.058	838	0.074	216	0.143
Friend	1893	0.073	840	0.074	142	0.094
No Response	1386	0.054	544	0.048	92	0.061
Newspaper	1236	0.048	531	0.047	62	0.041
Other Internet Site	1519	0.059	601	0.053	48	0.032
Billboard	241	0.009	116	0.010	47	0.031
Job Alert/Postcard Notification	1020	0.040	509	0.045	45	0.030
Job Line	691	0.027	302	0.026	40	0.027
School (Instr./Prof./Counselor)	148	0.006	66	0.006	12	0.008
Job Fair/Career Event	163	0.006	68	0.006	5	0.003
Television	88	0.003	20	0.002	4	0.003
Trade Journal/Publication	66	0.003	29	0.003	3	0.002
State Employment Office	31	0.001	6	0.001	3	0.002
Poster	5	0.000	2	0.000	2	0.001
Radio	58	0.002	16	0.001	0	0.000
	25756	100.0%	11401	100.0%	1506	100.0%

## Applicant Sources



# PERFORMANCE MEASUREMENT

## Overview

The Performance Measurement Division is responsible for the development, administration, scoring, and validation of all selection procedures used to establish registers for all entry level and promotional job classes within the Merit System. The major work activities performed within the Performance Measurement Division include:

- Conducting job analysis for all Merit System job classes in need of an eligible register
- Developing valid, job-related, and legally defensible employee selection procedures
- Creating and posting announcements for Merit System jobs on the PBJC online application system
- Reviewing applications submitted for Merit System job classes against established minimum qualifications for the positions
- Administering a variety of employee selection tests and candidate tutorial/orientation sessions
- Identifying and recruiting qualified, volunteer assessors to evaluate candidate performance on employee selection tests
- Conducting assessment centers designed to evaluate candidate perform on job-related selection procedures
- Entering data from employee selection tests, analyzing the psychometric properties of the test items, and calculating final scores for all candidates
- Notifying candidates of their examination scores and evaluating candidate appeals
- Establishing an eligible register including all candidates who passed the selection procedures
- Writing validation reports describing in detail all phases of the selection process outlined above

The overall mission of the Performance Measurement Division is to effectively serve the jurisdictions in the Merit System by developing fair, valid, and legally defensible selection systems in an efficient and customer-service oriented manner. In order to achieve this goal the Performance Measurement Division consistently works to improve the effectiveness of its work processes by staying abreast of developments in the field of employee selection and by leveraging available technology to improve the efficiency and accuracy of the work performed. Below are the goals set for the Performance Measurement Division for 2008.

- Develop and administer selection procedures that identify the most qualified candidates for employment in the Merit System.
- Develop and implement a job family approach to conducting job analyses and developing selection procedures.
- Conduct professional development activities to ensure test development staff remains up to date on legal, research, and scientific developments in the area of employee selection.
- Improve communication between jurisdictions and Performance Measurement.

## Staffing

The Performance Measurement Division currently consists of twenty-three full-time employees occupying six job classes. The positions include three Industrial-Organizational Psychologists, two Senior Assessment & Development Specialists, fifteen Assessment & Development Specialists, one Web Survey & Multimedia Developer, one Data Management Technician, and one Administrative Assistant I.

Alesia Hatten transferred to the Performance Measurement Division as an Administrative Assistant I after her return from active military duty in April, 2008. The Performance Measurement Division is in the process of making job offers to fill vacant Assessment & Development Specialist positions. One offer has been extended and accepted. Additional offers are expected in November, 2008.

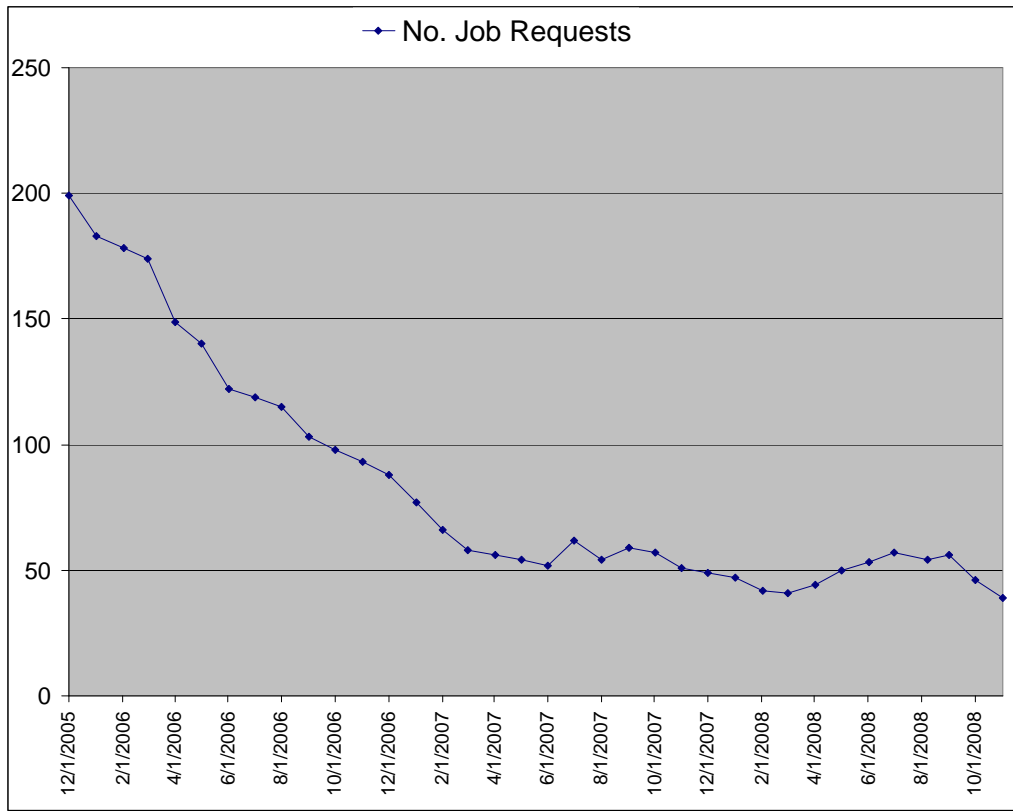
**Goal: Develop and administer selection procedures that identify the most qualified candidates for employment in the merit system.**

### *Active Requests*

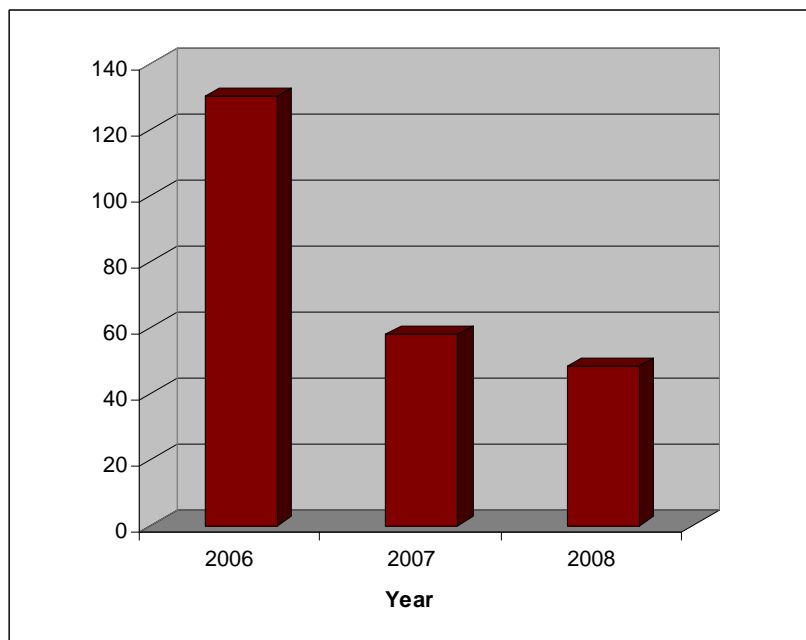
The primary function and goal of the Performance Measurement Division is to develop eligible registers for use by Merit System jurisdictions to fill vacant positions. The Performance Measurement Division constantly monitors its ability to meet the needs of the jurisdictions in a timely fashion by tracking the number of requests for certification lists for jobs in which no (or an inadequate) eligible register exists (i.e., requests referred to as being in "Testing Review").

As of November, 2008, 39 jobs with requests for certification lists were in testing review. This is the lowest total number of jobs in testing review in over five years (see Figure 1 for monthly tracking since December of 2005). The average number of jobs in testing review per month over the 2008 calendar year is also at its lowest in over five years. Figure 2 presents a bar graph representation of the mean number of jobs in testing review per month for the last three years.

**Figure 1. Month-by-Month Tracking of Jobs with Requests in Testing Review**



**Figure 2. Mean Number of Jobs in Testing Review per Month for Last Three Years**



Although there are currently 39 jobs in testing review, it should be noted that substantial work has been completed to ensure a suitable eligible register is established for each of these job classes in a timely manner. Below is a breakdown of the status of these certification requests:

- Six of the jobs for which requests exist currently have an active register; however, applications are continuing to be accepted due to a low number of qualified applicants and/or high turnover in the positions.
- Seventeen jobs are either currently announced (i.e., applications are being accepted) or have recently closed (i.e., ended application acceptance period) and a register is set to shortly follow.
- The remaining 13 jobs are currently being analyzed and/or selection procedures are being developed in order to establish an eligible register.

### *Public Safety Testing*

#### Police Officer/Deputy Sheriff

The PBJC is constantly working to better meet the needs of its member jurisdictions. One area in which there is a pressing need is in the area of entry-level Police officer/Deputy Sheriff. Traditionally, the PBJC recruited and tested for the job of Police officer/Deputy Sheriff only once per year, and only within the Birmingham metropolitan area. In August, 2007, in order to assure a steady supply of qualified public safety personnel to the jurisdictions, the Board began recruiting Police officer applicants on an open/continuous basis. Under this process, Police officer/Deputy Sheriff remains open for applications on a continuous basis, and PBJC tests and certifies candidates monthly instead of annually. All eligible candidates remain on the register for one year or until hired, whichever period is shorter. Progressing from annual to monthly testing allows for more competitive recruitment efforts, saves money, and better meets the critical public safety needs of the member jurisdictions. The current register based on continuous testing has led to 30% increase in the total number of eligible applicants on the register (or hired) in its first year of implementation when compared to the eligible register from the preceding year.

#### Police Promotional Series

Since the 2007 Annual Report, the Performance Measurement Division has administered examinations and released eligible registers for the entire Police/Sheriff entry-level and promotional series, including Police officer/Deputy Sheriff, Police/Sheriff Sergeant, Police/Sheriff Lieutenant, Police/Sheriff Captain, and Police Chief I, II, and III.

#### Firefighter

Over the past four years, the Performance Measurement Division has created new registers for entry-level Firefighter on a yearly basis. At this time, unlike Police officer/Deputy Sheriff, Firefighter remains a job that is tested on an annual, rather than a monthly, basis. The rationale behind this decision is based primarily upon the nature of the examination process. The Firefighter job consists of two written test components and a structured interview. The

structured interview greatly enhances the selection process for Firefighter, but makes monthly testing impractical at this time. After the 2008 administration of the written examination and the structured interview, the PBJC released a register for Firefighter on March 24, 2008 containing over 400 eligible candidates. Recruitment for the 2009 Firefighter register is currently underway.

#### Fire Promotional Series

During the period covered in this report, the Performance Measurement Division has administered examinations and released eligible registers for the Firefighter, Fire Apparatus Operator, Fire Battalion Chief I and II, and Fire Chief I, II, and III. The remaining two jobs in the Fire promotional series (i.e., Fire Lieutenant and Fire Captain) have been announced and test administrations are scheduled for November, 2008.

#### *Non-Public Safety Jobs*

Since the submission of the 2007 annual report, the PBJC has posted job announcements, tested applicants, and released registers for 258 jobs. A list of the jobs for which registers have been released since November 1, 2007 is presented in the table below.

**Table 1. Registers Released from November, 2007 through October, 2008**

Job Code	Job Title	Job Code	Job Title
00044	Medical Clerk	06031	Police officer/Deputy Sheriff
00060	office Assistant	06033	Police/Sheriff Sergeant
00063	Administrative Assistant I	06034	Police/Sheriff Lieutenant
00064	Administrative Assistant II	06035	Police/Sheriff Captain
00066	Administrative Assistant III	06091	Police Chief I
00068	Administrative Assistant IV	06092	Police Chief II
00069	Administrative Coordinator	06093	Police Chief III
00115	Legal Secretary	06340	Forensic Pathology Assistant
00117	Senior Legal Secretary	06411	Bailiff/Court Security
00273	Court Clerk	06429	Animal Control Aide
00274	Senior Court Clerk	06467	Latent Fingerprint Examiner
00275	Principal Court Clerk	06475	District Attorney's Investigator
00276	Court Coordinator	06490	Corrections officer
00279	Chief Clerk Probate Court	06551	Security officer
00645	Communications Operator II	07003	Surgical Technician
00763	Bindery Worker	07003	Surgical Technician - Anesthesia Tech
00815	Medical Stores Supervisor	07015	Central Supply Technician Trainee
00825	Records Management Analyst	07023	Central Supply And Materials Supervisor
00827	Records Management Manager	07033	Clinical Nurse Practitioner
00831	Auto Parts Clerk	07036	Case Manager, RN
00853	Stores Clerk	07041	Minimum Data Set Coordinator
00855	Senior Stores Clerk	07063	Nurse Supervisor
00873	Buyer	07071	Nursing Assistant
00880	Principal Buyer	07073	Licensed Practical Nurse

00895	Inventory Manager	07075	Staff Nurse
01003	Auditor	07079	Charge Nurse
01009	Chief Auditor	07082	School Health Nurse
01027	Principal Accountant	07083	Epidemiological Analyst
01028	Chief Accountant	07084	Public Health Nurse
01029	Cash & Investment Manager	07091	Flexipool Staff Nurse
01031	Budget Analyst	07092	LPN - Flexipool
01054	Risk Management Coordinator-Jefferson County	07095	Staff Nurse - Baylor
01077	Director of Hospital Fiscal Services (CGH)	07096	LPN - Baylor
01081	Director of Finance (Non-Jefferson County)	07183	Diagnostic Imaging Technician (NM)
01090	Assistant Director of Finance-JC	07183	Diagnostic Imaging Technician (Radiographer)
01093	Director of Finance-JC	07183	Diagnostic Imaging Technologist (Ultrasound)
01113	Tax Agent	07184	Special Imaging Technologist
01133	Revenue Examiner	07184	Special Imaging Technologist(Nuclear Medicine)
01135	Senior Revenue Examiner	07184	Special Imaging Technologist(Radiographer)
01178	Director of Tax Collection	07184	Special Imaging Technologist(Ultra Sound)
02015	Grants Management Coordinator	07193	Medical Laboratory Technician
02074	Deputy Director-Board of Registrars	07194	Medical Technologist
02085	Senior Administrative Analyst	07243	Respiratory Therapist
02105	City Clerk I	07245	Cardiopulmonary Services Manager
02106	City Clerk II	07253	Occupational Therapist
02107	City Clerk III	07271	Physical Therapist Assistant
02245	Senior Juvenile Detention officer	07280	Speech Language Pathologist
02284	Probation officer	07304	Water Pollution Control Technician(Bessemer & Irondale)
02286	Senior Probation officer - Family Court	07304	Water Pollution Control Technician(Barton Laboratory)
02286	Senior Probation officer - Youth Detention	07304	Water Pollution Control Technician (Storm Water)
02287	Principal Probation officer	07307	Senior Water Poll Control Technician
02350	Pretrial Release officer	07334	Environmental Laboratory/Compliance Administrator
02352	Senior Pretrial Release officer	07363	Disease Intervention Specialist
02384	Social Worker	07375	Environmental Health Program Supervisor (Food & Lodging)
02386	Senior Social Worker	07401	Dental Assistant
02460	Paralegal	07403	Dental Hygienist
02484	Senior Attorney	07407	Principal Dental Hygienist
02486	Principal Attorney	07493	Clinical Dentist
02513	Computer Operator II	07497	Assistant Director of Dental Health
02544	Senior Systems Architect	07540	Patient Activity Leader
02551	Network Systems Administrator I	07626	Health Services Project Administrator
02552	Network Systems Administrator II	07657	Director of Quality Improvement- JRHC
02555	Senior Programmer	07663	Assistant Nursing Ed/Training Coordinator
02557	Programmer Analyst (GIS)	07672	Nursing Education/Training Coordinator
02565	Senior Systems Programmer (Technical Support)-Birmingham	07677	Director of Hospital Education-CGH
02573	Geographic Information Systems Technician II	07685	Public Health Medical officer

02577	Geographic Information Systems Database Supervisor	07687	Medical Director
02578	G.I.S. Database Administrator	07745	Nutrition Consultant
02583	Systems Analyst (Multi-Platform) Jefferson County	07853	Health Information Services Technician
02583	Systems Analyst (GIS)	07875	Deputy Director, Admin Services - JRHC
02597	Technical Services Manager	07877	Deputy Director of Nursing Services - JRHC
02730	Statistical Analyst	07879	Director, Jefferson Rehabilitation And Health Center
02824	Human Resources Information Services Manager	07889	Chief Executive officer-Jefferson Health System
02827	Records Mgmt Team Leader	07903	Pharmacy Technician
02832	Examination And Certification Assistant	07977	Clinical Pharmacist
02849	Training Advisor	08031	Truck Driver
02858	Medical Personnel Coordinator	08045	Street Paving Supervisor
02863	Assessment & Development Specialist	08063	Skilled Laborer
02869	Employee Relations Team Leader	08069	Public Works Coordinator
02886	Personnel Division Manager	08073	Landfill Supervisor
02963	Community Resource Representative-HD	08082	Bridge Maintenance Worker
02965	Senior Community Resource Representative	08133	Meter Technician
02971	Human Resource Planner	08184	Maintenance Mechanic
03034	Senior Planning Technician	08191	Assistant Automotive Technician
03062	Urban Designer	08193	Automotive Technician (Car & Light Truck)
03109	Senior Civil Engineer	08193	Automotive Technician-Heavy Truck
03111	Chief Civil Engineer	08250	Turfgrass Supervisor
03177	Assistant Director of Environmental Services	08265	Arborist
03327	Traffic Signs And Markings Supervisor	08267	Senior Arborist
03333	Traffic Planning Technician	08271	Urban Forester
03334	Senior Traffic Planning Technician	08282	Gardener
03335	Traffic Analyst	08287	Landscape Crewleader
03411	Engineering Aide	08292	Parks Maintenance Superintendent
03412	Senior Engineering Aide	08295	Horticulture Maintenance Supervisor
03475	Chief of Party	08335	Sewer Line Video Supervisor
03485	Engineering Inspector	08353	WWTP Maintenance Worker
03487	Principal Engineering Inspector-Surveyor	08394	WWTP Shift Supervisor
03487	Principal Engineering Inspector-Construction & Inspection	08457	Water Utility Inspector
03487	Principal Engineering Inspector-Drafter	08474	Senior Mains Service Worker
03525	Graphic Artist	08481	Power Distribution Helper
03580	Drafter	08483	Power Distribution Worker
03584	Senior Engineering Drafter	08484	Electrical Distribution Assistant Supervisor
03610	Electronics Technician	08485	Electrical Distribution Supervisor
03640	Audio-Visual Technician	08488	Electrical Operations Manager-Bessemer
03673	Land Acquisition Agent	08495	Environmental Coordinator
03764	Air Pollution Control Engineer	08533	Carpenter
04132	Lifeguard	08543	Plumber
04169	Exercise Physiologist	08573	Painter
04173	Fitness Instructor	08593	Electrician (Industrial)

04187	Parks And Recreation Superintendent - Center Point	08611	Guard
04197	Director of Homewood Parks & Recreation	08621	Buildings And Grounds Worker
04321	Aircraft Museum Restoration Technician (Part-Time)	08645	Building Maintenance Supervisor
04387	Museum Curator of Education, Birmingham Art Museum	08663	Equipment/Structural Mechanic
04415	Event Manager	08690	Director of General Services - HD
05024	Assistant Fire Chief-Hueytown	08694	Facilities Manager-HD
05026	Fire Apparatus Operator	08697	Assistant Director of General Services
05031	Firefighter	08698	Deputy Director of General Services
05035	Fire Battalion Chief II	08699	Director of General Services - Jefferson County
05038	Fire Battalion Chief I	08713	Public Works Director I
05096	Fire Chief I	08875	Assistant Bridge Superintendent
05097	Fire Chief II	09031	Food Service Assistant
05098	Fire Chief III	09035	Cook
05248	Chief Plumbing, Gas And Mechanical Inspector	09055	Food Service Supervisor
05270	Condemnation/Demolition Inspector	09057	Senior Food Services Supervisor
05273	Chief Condemnation/Demolition Coordinator	09093	Dietitian
05354	Zoning Inspector	09173	Housekeeping Assistant
05434	Sewer Service Inspector	09179	Director of Housekeeping
05436	Sewer Service Supervisor	09194	Senior Laundry Worker
05456	Senior Sanitation & Ordinance Inspector	09199	County Laundry Superintendent

In order to ensure that the time required for the PBJC to fulfill a request for certification is minimized and to ensure that registers stay up to date, the Performance Measurement Division is also working on a significant number of jobs for which no unfulfilled request for certification is in place. During 2008, the Performance Measurement Division worked on job analyses for over 120 jobs. The job analyses consisted of conducting background research, conducting on-site job observations/ interviews, facilitating focus groups, and administering and analyzing job analysis questionnaires.

In addition to the job analysis work, the PBJC conducted 43 test administrations (and subsequent assessment processes), consisting of over 75 test exercises, during the period covered by this report. In these test administrations, over 6000 candidates were tested.

**Goal: Maximize the efficiency, effectiveness, and usefulness of job analysis information for Merit System classes by capitalizing on available technology and implementing a job family approach to studying jobs.**

The Performance Measurement Division has a number of initiatives designed to meet this goal, including implementing an on-line job analysis questionnaire, conducting job family-based job analyses, and providing job analysis information to Classification & Compensation for use in establishing job descriptions and resolving classification issues.

In order to more efficiently and effectively study jobs for purposes of developing valid, fair, and legally defensible selection procedures, the Performance Measurement Division set a goal to implement a job family approach to conducting job analyses. The Performance Measurement Division has successfully instituted the process and has completed or is currently working jobs in 13 different job families. The goal of the job family approach is to improve over past procedures by:

- increasing the amount of information that can be obtained from subject matter experts (SMEs) for related jobs, subsequently reducing the total number of meetings that SMEs must attend;
- creating greater consistency in the job analysis information and minimum qualifications obtained/developed for related jobs;
- allowing for easier identification of promotional patterns among related jobs;
- helping to identify any issues with the classification of positions or identify positions being worked out of class;
- and creating a more efficient and cost effective selection process by identifying common selection requirements across related jobs.

The online job analysis questionnaire (JAQ) is designed to make data collection, analysis, and information sharing more efficient and effective. The online JAQ has been completed and pilot tested and is fully functional. The online JAQ allows SMEs to complete the questionnaire from any computer that has internet access, which essentially eliminates the need for travel by SMEs to the PBJC to participate. It also allows SMEs to work on the questionnaire and save the information in various stages so that they can come back to work on the document, if necessary, at a later time. Additionally, the online JAQ has a data analysis and report functioning that allows PBJC staff to quickly and easily analyze data obtained from the subject matter experts and identify the important aspects of the job. Reports are generated in an easy to interpret and use format and data can be exported to other programs (e.g., Excel). This will also allow for easier data sharing with other departments (e.g., Classification & Compensation). Overall, the online JAQ will greatly improve the convenience, accuracy, and efficiency of the job analysis process.

**Goal: Conduct professional development activities to ensure test development staff remains up to date on legal, research, and scientific developments in the area of employee selection.**

A continuous goal of the Performance Measurement Division is the professional development of its employees. The Performance Measurement Division believes that it is imperative that staff stay up to date on departmental procedures, relevant employment laws, professional guidelines, and developments in the field of employee selection. A number of activities designed to meet this goal have been performed in 2008.

- Libby Miller, Senior Assessment & Development Specialist, attended the 2007 Labor and Employment Law Seminar offered by Balch & Bingham held in Birmingham, Alabama on October 26 and 27, 2007. The seminar provided information on recent developments in labor and employment law, including those relevant to hiring and promotional processes.
- A workshop/presentation designed to keep members of Performance Measurement up to date on research and developments in the area of employee selection was conducted by a team from Performance Measurement on January 30, 2008. The presentation covered research on assessment centers and ways in which this method of assessment can be improved.
- Tamela Parrish, Data Management Specialist within the Performance Measurement Division, attended a 4-day training session on Crystal Reports in Atlanta, Georgia.
- Ashanti Edwards, Assessment & Development Specialist, received her Ph.D. in Industrial & Organizational Psychology at Clemson University of in May of 2008.
- Keisha Wicks, Assessment & Development Specialist, received her Ph.D. in Industrial & Organizational Psychology at the University of Central Florida in July of 2008.
- Jamie Koladish, Assessment & Development Specialist, completed and passed the examination to obtain his Senior Professional in Human Resources (SPHR) Certificate. The SPHR Certificate focuses on strategic and policy-making aspects of human resource management, including strategic management, workforce planning and employment, HR development, compensation and benefits, employee and labor relations, and occupational health, safety and security.
- The Performance Measurement Division conducted its annual one-day professional development retreat in July, 2008. Each team within the division was responsible for developing and administering a professional development/team building activity during the retreat. Activities focused on improving teamwork, communication, creativity, and customer service.
- Bronze McGhee, Assessment & Development Specialist for the Performance Measurement Division, served as a guest speaker on employee selection and to a Communication Studies class at the University of Alabama at Birmingham in September, 2008.

- The following staff members from the Performance Measurement Division graduated from a Certificate program offered by the PBJC Training Department:
  - Rance Allman (Supervisory Certificate)
  - Brian Bellenger (Supervisory Certificate)
  - Kyle Brink (Supervisory Certificate)
  - Jamie Koladish (Supervisory Certificate)
  - Stacey Lange (Supervisory Certificate)
  - Libby Miller (Supervisory Certificate)
  - Keisha Wicks (Computer Skills Certificate)
- A number of staff members have participated in various free webinars offer by US Research Associates. Staff members have completed trainings on the following topics:
  - Adverse Impact in Testing, Selection, Promotional and Reductions-in-Force Decisions
  - A Nine-Session Course on Basic Applied Statistics
  - Criterion Validation
  - Identifying and Understanding Adverse Impact in Hiring, Promotional, and Layoff Decisions Using Binary Logistic Regression
  - Content Validation
  - Using Microsoft Excel To Effectively Communicate Data Analysis Results
- Seven members of the Performance Measurement Division attended the 23rd Annual Conference for the Society for Industrial and Organizational Psychology. In addition to attending seminars and other educational sessions, these staff members also presented research and/or participated in conference seminars. The research/seminars in which PBJC staff were involved are listed below:

**Allman, III, R. P. L. & Sutton, M. D.** (2008). *Preparation time, response time, and performance on structured interviews*. Symposium presented at 23<sup>rd</sup> Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.

Arnold, J. D., Campion, M. A., Nieminen, L. R. G., **Oliver, L. O.**, Tippins, N. T., Schmitt, N. W., Zedeck, S. (2008). *Situational sufficiency of validation research strategies: considerations in ensuring an "appropriate" level of professional rigor*. Panel Discussion presented at 23<sup>rd</sup> Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.

**Brink, K. E., Crenshaw, J. L., & Alber, M.** (2008). *Relationships between completion time, performance and faking on biodata/personality measures*. Symposium presented at 23<sup>rd</sup> Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.

**Brink, K. E., Lance, C. E., Bellenger, B. L., Morrison, M. A., Scharlau, E. A., & Crenshaw, J. L.** (2008). *Discriminant validity of a “next generation” assessment center*. Symposium presented at 23<sup>rd</sup> Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.

**Crenshaw, J. L.** (2008). *Building a bridge to your career in I/O psychology*. Invited panelist in the 23<sup>rd</sup> Annual Lee Hakel I/O Doctoral Consortium for the Society for Industrial and Organizational Psychology, San Francisco, CA.

Halpert, J. A., Stuhlmacher, A. F., **Crenshaw, J. L.**, & Litcher, C., & Bortel, R. (2008). *Paths to negotiation success*. Paper presented at 23<sup>rd</sup> Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.

**Oliver, L. O.** (2008). *Building a bridge to your career in I/O psychology*. Invited panelist in the 23<sup>rd</sup> Annual Lee Hakel I/O Doctoral Consortium for the Society for Industrial and Organizational Psychology, San Francisco, CA.

Pritchard, R.D., Thornson, C.A., **Wicks, K.** (2008). *Perceived instrumentality of an intervention: How important is metacognitive feedback?* Poster presented at 23<sup>rd</sup> Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.

- Three Performance Measurement staff members attended the International Public Management Association – Assessment Council 32<sup>nd</sup> Annual Conference on Personnel Assessment. These staff members also conducted several presentations at the conference:

**Bellenger, B. L. & Dean, C. R.** (2008). *Cheating on promotional public safety examinations: Strategies for responding to a widespread test security compromise*. Seminar presented at the 32<sup>nd</sup> Annual Conference on Personnel Assessment: International Public Management Association – Assessment Council, Oakland, CA.

**Brink, K. E. & Crenshaw, J. L.** (2008). *Adverse impact: What is it and how do you calculate it?* Tutorial presented at the 32<sup>nd</sup> Annual Conference on Personnel Assessment: International Public Management Association – Assessment Council, Oakland, CA.

**Crenshaw, J. L., Bellenger, B. L., & Brink, K. E.** (2008). *Video based testing: Advantages, limitations, and practical feasibility*. Seminar presented at the 32<sup>nd</sup> Annual Conference on Personnel Assessment: International Public Management Association – Assessment Council, Oakland, CA.

**Crenshaw, J. L. & Luke, P.** (2008). *Improving testing in local government through the use of a video-based assessment center*. 2008 Innovations in Assessment Award acceptance presentation. Presented at the 32nd Annual Conference on Personnel Assessment: International Public Management Association – Assessment Council, Oakland, CA.

- One Performance Measurement staff member attended the 2008 Annual Conference of the Academy of Management. This staff members also conducted a presentation at the conference:

**Brink, K. E. & Lance, C. E.** (2008). *Development and validation of a newcomer socialization measure of information seeking frequency*. Paper session presented at the meeting of the Academy of Management, Anaheim, CA.

- A number of other presentations, papers, and book chapters have been written and submitted by Performance Measurement staff. These activities are designed to help promote the PBJC to the human resource community and to help advance the field of employee selection. Presented below are that presentations, papers, and/or book chapters that have been submitted and are currently under review:

**Bellenger B. L. & Crenshaw, J. L.** (under review). *Examining racial bias in the assessment of employment Interviews*. Symposium presentation under review for the meeting of the Society for Industrial and Organizational Psychology, New Orleans, LA.

Birkelbach, D., **Brink, K. E., & Lance, C. E.** (under review). *Race bias in structured interview and assessment center ratings*. Symposium under review for the meeting of the Society for Industrial and Organizational Psychology, New Orleans, LA.

**Brink, K. E. & Crenshaw, J. L.** (under review). *Comparing black-white differences on video vs. audio structured situational interviews*. Symposium presentation under review for the meeting of the Society for Industrial and Organizational Psychology, New Orleans, LA.

**Crenshaw, J. L.** (under review). *Impact of range restriction corrections on structured interview group differences*. Symposium presentation under review for the meeting of the Society for Industrial and Organizational Psychology, New Orleans, LA.

**Miller, M. E. & Lange, S. L.** (under review). *The relationship between seniority and test performance*. Poster presentation under review for the meeting of the Society for Industrial and Organizational Psychology, New Orleans, LA.

**Brink, K. E.** (under review). *Adverse Impact*. Under review in W. J. Rothwell (Ed.) Human Resource Encyclopedia Volume 1 - Articles. San Francisco, CA: Pfeiffer.

**Brink, K. E.** (under review). *Adverse Impact Analysis*. Under review in W. J. Rothwell (Ed.) Human Resource Encyclopedia Volume 2 – Forms and Tools. San Francisco, CA: Pfeiffer.

**Goal: Review and reorganize work and organizational structure to maximize efficiency and effectiveness of application services, while minimizing costs to the system.**

The PBJC continuously reviews how work is performed within the organization in order to ensure that the work processes and organizational structure are set up in a manner that is efficient, cost effective, and results in high quality work. One initiative that is designed to address this goal is the transition of the process of creating announcements and screening applications from the Performance Measurement Division to the Workforce Development & Applicant Services (WDAS) Division. This transition is designed to enhance the cost effectiveness of the work performed and improve service by bringing closer together the recruiting and applicant screening functions.

The process of transitioning the work is being conducted in phases in order to ensure a smooth transition. Two positions from Performance Measurement have been re-assigned to WDAS. These positions, along with other positions within WDAS will assume the responsibility of creating announcements for applications and the screening of applications against pre-established minimum qualifications. Training has been conducted on the software and procedures used in the announcement and application screening processes. To date, nearly all of the open continuous job announcements have been transferred from Performance Measurement to WDAS. Additional responsibilities will be transferred in stages as WDAS staff become more familiar with the work processes and procedures involved.

**Goal: Improve applicants' and general public's knowledge of PBJC testing, register establishment procedures, and Merit System principles.**

Developing effective relationships between the PBJC and its customers is key to providing effective service. Educating the general public to the principles of merit/civil service systems and the employment processes within the PBJC Merit System, will greatly enhance the quality and quantity of applicants interested in employment within our system. To this end, the Performance Measurement Division has undertaken a number of initiatives to help in this area.

First, the PBJC purchased new mail preparation equipment and mailing forms to assist in generating and preparing notices to be mailed to applicants to inform them of the status of their applications. Through the use of these new forms and

the new equipment, the PBJC was able to make substantial improvements in the information directly communicated to applicants for employment. The new notices provide substantially greater information on the Merit System hiring process, the process for appealing employment decisions, staying up to date on the status of an application, and websites and phone numbers that are helpful in the merit system employment process.

The Performance Measurement Division has also focused on increasing communication to jurisdictions regarding the status of requests for certification lists on jobs for which no active register exists. Upon receiving notification of a need for a certification list, the Performance Measurement Division has instituted a process whereby information is sent to the department manager and the human resources staff informing them of the person handling the job analysis and announcement, projected dates for opening and closing the job announcement, and the projected date by which they should receive a certification list. Such communication help jurisdictions appropriately plan for filling employment vacancies.

Additionally, the Performance Measurement Division has begun work on a project to help provide greater information to internal and external customers and the general public. The project is the development of a video "orientation" to the PBJC testing procedures, register establishment processes, Merit System principles, and the Merit System's member jurisdictions and agencies. The purpose of this project is to provide extensive information to current Merit System employees, potential applicants and recruits, and jurisdiction leaders in an efficient and cost effective manner. Once developed, the video orientation will be able to serve as both a recruiting and an educational tool that can be presented to candidates during test administrations, provided over the internet to interested individuals, and distributed in DVD form to potential applicants at career fairs or other recruiting functions. Although initial project development meetings have been conducted, work on this process has been postponed due to heavy primary workloads. Additional work will continue on this project as vacant positions within the department are filled.

**Goal: Maximize the availability and use of volunteers from the field of human resources for assessment of PBJC selection processes.**

Another goal of this division is to enhance the recruitment of volunteer assessors to assist in evaluating the performance of candidates on selection procedures administered by the PBJC. To accomplish this, Performance Measurement undertook the development of a certificate program to train and prepare individuals for assessment of employee selection measures administered by the PBJC. The purpose of this project is to (1) capitalize on the PBJC's technological capabilities in order to create an enhanced assessor training program, and (2) establish greater relationships with volunteer assessors to enhance their experiences and increase the likelihood of continuing the working

relationship in the future. By creating a certificate program, the PBJC can reduce costs associated with recruiting assessors by strengthening the relationship with existing assessors and reduce costs associated with assessor overnight stay by increasing the number of repeat assessors who have been thoroughly trained on the assessment process. A project development team reviewed the existing assessor training program and identified areas for improvement and additional exercises that could help ensure appropriate transfer of knowledge. The changes to the program have been finalized and the first administration of the certificate training is scheduled for December, 2008.

## **Awards & Recognition**

Stacey Lange, Senior Assessment & Development Specialist in the Performance Measurement Division, received the Coldwater Creek Spirit of Service Award for her volunteer work with the Susan G. Komen Breast Cancer Awareness campaign. The award is designed to recognize a special volunteer who symbolizes the spirit of volunteerism with his/her dedication and selfless service to the fight against breast cancer in the Birmingham community. Stacey has been instrumental in assisting the Komen foundation in recruiting volunteers and in heading a very successful fundraising campaign that has extended beyond the PBJC to also include other jurisdictions within the Merit System. Through the efforts of Stacey and many other PBJC staff members, the organization was able to raise nearly \$5000 for the Komen Breast Cancer Awareness campaign.

The International Public Management Association Assessment Council (IPMAAC) selected the Personnel Board's Performance Measurement Division as the recipient of the 2008 Innovations in Assessment Award. This award recognizes an individual or team of individuals for the development and application of an innovative personnel assessment tool or procedure. The award was open to any individual or group of employees in the personnel assessment field responsible for developing and applying an innovative assessment tool or procedure within recent years. The Innovations in Assessment Award was awarded to the Performance Measurement Division for its innovative use of video and audio technology in assessment practices, for its commitment to individualized assessment and higher-fidelity testing, and the development and implementation of the PBJC video-based assessment center facility. The award was presented formally at the IPMAAC Conference held in Oakland, CA on June 10, 2008. As the winner of the award, the PBJC was invited to share its innovative selection practices with the IPMAAC membership during a scheduled presentation at the conference.

# TRAINING & CAREER DEVELOPMENT

## Overview

The Training and Career Development Department is responsible for coordinating a system-wide strategic human resource development training program that includes training and development efforts useful for all jurisdictions, as well as focused program development for specific initiatives, departments or jurisdictions. The Department's goal is to offer all Merit System employees a curriculum of courses and learning activities to increase their competency and help them grow and excel in their careers. Increased competency of Merit System employees can lead to greater job satisfaction and productivity that will, in turn, result in better municipal services for Jefferson County citizens.

Training and Career Development is approved for staffing of four FTEs - three Training Advisors and one Training Assistant. The department is currently staffed by Pete Blank, Training Advisor, and Josh Gilliam, Training Advisor.

## Activities and Accomplishments

Following are highlights and accomplishments for the Report year.

## Training Participants

Calendar Year to Date	Participants
November 2007	222
December 2007	173
January 2008	220
February 2008	266
March 2008	139
April 2008	232
May 2008	178
June 2008	110
July 2008	301
August 2008	227
September 2008	197
October 2008	227
<b>CALENDAR YEAR TOTAL</b>	<b>2492</b>

## **PROJECTS**

### **Specialized Jurisdictional Training**

The training team continues to reach out to member jurisdictions to provide training opportunities on-site to alleviate travel concerns and allow for team-specific curriculum.

In June, Training traveled to Bessemer to host two customer service training sessions at the Bessemer Utilities headquarters. 20 employees from Streets and Sanitation and Bessemer Utilities attended the two sessions.

“Excelling at the Front Desk” was delivered over two days in September to employees of the Jefferson County Department of Health. The JCDH also videotaped a session to use for possible future training sessions.

In October, Training led a class at Jefferson County Family Court titled “Finding PASSION in your work.” Training will return to offer it again in November. This is the 3<sup>rd</sup> class in the past year that training has delivered on-site at Family Court.

In order to create team cohesion and provide growth opportunities, the Director of the PBJC mandated that the leadership team complete the Supervisory Certificate program. Eight cohort classes were created to create a sense of community and allow for open discussion of work issues directly related to the PBJC. Training provided these sessions on site at the 2121 building between May-September 2008.

### **New Training courses**

Training continues to add new and relevant offerings that will enhance the performance of Merit System employees. Between May – October, training delivered the alpha and beta pilots of multiple training classes:

- Disability Etiquette
- Diversity Awareness
- Cultural Competency
- Keeping and Building the Public’s Trust
- The Myers-Briggs Type Indicator
- LEDGE (**L**Eadership **D**evelopment for **G**overnment **E**xecutives)
- Basic Computer Skills Certificate
- Webcasts on topics such as managing government employees, igniting commitment, and career contentment

Based on feedback from the participants, Training will continue to offer all of these classes in 2009.

## **Supervisory Certificate Program**

Training continues to offer the Supervisory Certificate Program as a way for merit system leaders to develop their leadership skills. By completing 12 core courses and 3 elective courses, participants complete around 60 hours of classroom training. Topics include delegating, coaching, motivation, employee conflict, customer service, legal landmines, and workplace harassment.

115 Merit System employees have completed the program since its inception in 2006.

## **Certificate Program Graduation Celebration**

On May 7, 36 Merit System employees were recognized as graduates of the PBJC Supervisory Certificate Program. The event was held at the Birmingham Botanical Gardens. After a continental breakfast and networking opportunities, the graduates moved into the auditorium, where they were presented with their certificates. Lorren Oliver, Director, welcomed the attendees, and Dr. John C. Knapp from the Center for Ethics and Corporate Responsibility at Georgia State University delivered the keynote address. Total attendance for the event, including recipients, supervisors, and appointing authorities, was approximately 75 people.

On the morning of October 29, training hosted its fourth Certificate Program Graduation Celebration at the Birmingham Botanical Gardens. Thirty-six graduates were recognized at the event for their accomplishments. This was the first time to recognize recipients from BOTH programs - thirty-three from the Supervisory Certificate program and three from the Basic Computer Skills Certificate program. Following breakfast, Pete Blank, Training Advisor, PBJC, congratulated the recipients and then introduced Gene Kirkconnell, Vice President and General Manager, WVTM-TV NBC 13 HD. Gene spoke on leadership and the importance of being real, being open and being kind.

## **CareerZone**

The original CareerZone system was instituted to replace the costly Aspen LMS. However, due to technical issues and the separation of our webmaster a second revision to CareerZone was made.

The latest version of CareerZone went online in January 2008. There were no major user errors and the system has operated smoothly since that time. Currently, the new webmaster has implemented modifications to enhance the scope of CareerZone. These enhancements will allow jurisdictions to add, modify and schedule their independent training offerings and events and increase ease of use for both administrators and system users.

## **Departmental Goals for FY 2008**

**Goal: Partner with local community colleges and educational institutions to provide enhanced learning opportunities for all merit system employees.**

Training partnered with Jefferson State Community College to present a program titled "Summer Learning Series 2008". With intent on providing real-world training opportunities at a convenient location, the concept was well received and marketed. Topics included selling on e-bay, traveling tips, digital photography and instant piano. While the first session was well attended, low enrollment for the remaining three resulted in cancellation of the remaining sessions. Training will continue to work with JSCC to determine best fit opportunities for Merit System employees.

Training has begun a relationship with Samford University to determine the need for an executive education program specifically designed for Merit System executive leaders.

**Goal: Develop and deliver an executive leadership training strategy for Directors, Chiefs, and other qualified leaders in the merit system.**

Twenty-two Merit System leaders successfully completed the **LE**adership **D**evelopment for **G**overnment **E**xecutives (LEDGE) program, which was held on August 6, 13, and 20. Participants completed the Dimensions of Leadership Profile and the Myers-Briggs Type Indicator. The goal of these sessions was to increase self-awareness of leadership skills, provide networking opportunities, and allow for relevant discussion of civil service leadership issues in 2008. Anecdotal data shows that the program was successful. A detailed evaluation was sent out electronically to all attendees, and that data will be used to enhance the program as it moves forward.

Training will be taking the LEDGE program on the road in December to the Vestavia Hills Fire Department officer team.

**Goal: Enhance instructor knowledge through avenues such as certifications, specialized training, and continuing education.**

The PBJC Training Team is passionate about continuing education. To stay competitive in the market, it is essential that the training advisors stay current in training concepts, technology, and business acumen. Training Advisors have remained actively involved in meetings and programs sponsored by the American Society for Training and Development (ASTD).

Pete Blank accepted a role as Vice President of Communications for the Greater Birmingham Chapter of the American Society for Training and Development. As a board member, he is responsible for sharing chapter information with over 100

members. This also allows him to share information about the PBJC with other training professionals in the Birmingham business community.

**Goal: Improve overall IT offerings by increasing frequency, adding a certificate program, and updating offerings.**

### **Basic Computer Skills Certificate**

During 2007 and 2008 Training worked to determine the proper curriculum and requirements for the Basic Computer Skills Certificate. This certificate provides graduates the ability to competently navigate a PC and utilize the majority of the Microsoft Office Application Suite. Program participants must demonstrate a minimal typing speed of 20 words per minute at entry or they will have to complete the Keyboarding course. Graduates will demonstrate a minimal typing speed of 45 words per minute.

### **Web-based Training**

Training and the webmaster are currently reviewing applications to move Training and Career Development into the realm of online education. The proposed software is currently Adobe Captivate, a replacement to the industry-standard, Authorware. Once the product is comprehensively reviewed and purchased, Training will begin development of an online version of Customer Service Basics.

### **Administrative Assistant Certificate**

During 2008 Training began the process of designing and developing a certificate program aimed at increasing the skills of the Administrative Assistant series of positions. The process began with the analysis of the Administrative Assistant III job class in order to determine the primary skills of a successful incumbent. After the initial assessment, it was decided that more information was necessary to pinpoint required skills. To that end, Training is currently working with the webmaster to release a survey to be completed by supervisors of Administrative Assistants III and IV and Administrative Coordinators to identify the skills necessary to excel in the administrative series.

# **CLASSIFICATION AND COMPENSATION**

## **Overview**

Classification and Compensation (C & C) is responsible for establishing classifications for all Merit System jobs, assuring that employees are properly assigned to job classes, and that job classes are appropriately assigned to salary grades. Classification and Compensation reviews Position Description Questionnaires (PDQs), conducts job audits, writes classification specifications, and collects and analyzes labor market data to assure competitive positioning of Merit System jobs. It is the objective of the Classification and Compensation Department to create and maintain a classification and compensation system that fosters career growth and is both externally competitive with regard to relevant labor markets and internally equitable.

Activities include the review, analysis and recommendation of reclassification, re-grade and new position requests initiated by jurisdiction authorities; setting up new positions on the payroll system; the creation of new job classes, the deletion or collapsing of existing job classes; the review of requests for advanced steps; the review of requests for medical pay plan hires; the review and analysis of labor market data through participation in salary surveys; the review of premium pay requests, the review of independent vendor contracts; the review of laborers to validate duties being performed; and, the conduct of the Annual Classification Survey in accordance with § 12 of the Enabling Act of the State of Alabama, which mandates the review of all positions in the Merit System at least once in a five-year period.

The Classification and Compensation Department is currently staffed with three FTEs. An additional Compensation Advisor is being added, in part, to assist with contract review and with the audit of laborers employed by the jurisdictions.

The Compensation Manager is a Certified Compensation Professional with 20 years of human resources experience. The two existing Compensation Advisors have approximately 40 years of combined experience in the Merit System and are both working towards obtaining a certificate in Salary Administration from WorldatWork (formerly the American Compensation Association).

## **Activities and Accomplishments**

A principal activity of the Classification and Compensation Department during the reporting period was concluding the 2007-2008 Annual Classification Survey and launching the 2008-2009 Survey that began July 1, 2008.

With regard to the 2007-2008 Survey, job classes in the Fire Protection, Police, Sheriff and Security Guard job families were evaluated. One thousand nine hundred seven (1,907) Position Description Questionnaires (PDQs) were submitted and reviewed. This represented 61% of the population of employees eligible to submit PDQs, which is slightly lower than previous years; however, there is a high degree of homogeneity in the job classes that were studied. Two hundred five (205) desk audits were conducted. This resulted in ten (10) recommendations for reclassification. Five (5) appeals were filed, all related to grade level, which is not appealable. A Public Hearing was held May 23, 2008. The Board adopted the Survey on June 10, 2008.

The 2008-2009 Survey began July 1, 2008. A total of one thousand two hundred fifty six (1,256) employees were eligible to participate. Job classes in the following job families are included in the 2008-2009 Survey:

Building Maintenance	Nursing Services
Dental Services	Nutrition Services
Environmental Health	Pharmaceutical
Hospital Administration	Physical/Occupational Therapy
Housekeeping	Public Health Administration
Laboratory/Hospital Technical	Skilled Trades
Mental Health	Street & Sanitation Admin
Misc Construction/Maint/Oper	Wastewater Treatment

During September and October, the Classification and Compensation staff reviewed a total of six hundred thirty eight (638) PDQs. 22% of the PDQ incumbents are scheduled for on site job audits based on the information presented. Audits will be conducted during the months of November through January of 2009. Recommendations will be communicated to employees in March of 2009.

Communications with employees about the Survey process continues to be an area of focus for the Department. Several efforts throughout the year were centered on improving communication with participants. During June and July, in-class instruction and training on how to complete the PDQ was offered to participants. There were two Merit Matters Newsletters dedicated to explaining the Annual Survey process and providing important dates. A PowerPoint presentation was developed and made available to participants on the website. Payroll Coordinators for each jurisdiction were asked to include a message on each employee's pay stub concerning the Survey.

Additional Activities:

New Positions	315
Reclassifications	8
Advanced Step Approvals	91
Labor Market Salary Surveys	16
New Classes Created	11
• Audio Visual Technician	
• Chief Auditor	
• Chief Financial Officer	
• Deputy Director of Environmental Services	
• Information Specialist OSCS	
• Nurse Supervisor	
• Records Management Manager	
• Records Management Analyst	
• SAP Application Specialist	
• SAP Project Manager	
• Speech Language Pathologist	

Also during the report period, the Classification and Compensation staff continued the process of aligning classification specifications with the most recent job analysis information collected by Performance Measurement. To date, seventy eight (78) positions have been reviewed and classification specifications modified as needed. This will be an ongoing process and will assure that classification specifications published by the Board are up-to-date and consistent with information collected by the Performance Measurement staff during the job analysis phase of test development.

Another undertaking of the Classification and Compensation staff was the review of independent contractor agreements for Jefferson County. The primary purpose of the evaluations is to determine if the work described can be performed as well, as practically, as expeditiously, or as economically by Merit System employees as by the contractor. For the reporting period, the staff reviewed a total of fifty seven (57) contracts. Six (6) were recommended for denial based on the duties outlined in the contracts and the availability of Merit System employees to perform the work. Eight (8) were conditionally approved for four (4) months while additional information was collected and reviewed. The staff also reviewed one (1) contract for The City of Leeds and two (2) contracts for the Health Department.

The Classification and Compensation staff also led the review of laborers in the City of Bessemer, Jefferson County and in the City of Birmingham. Individuals performing laborer duties assigned by the jurisdictions are not in classified positions. The objective of the review was to validate the jurisdictions use of laborers by identifying major duties performed. Classification and Compensation,

working with the Performance Measurement Department, interviewed a total of 110 laborers in the City of Bessemer, 273 in Jefferson County and 516 in the City of Birmingham. In the City of Bessemer, 57% of the individuals interviewed were recommended to remain as laborers while the other 43% were recommended for Merit System classifications. The City of Bessemer presented an action plan that included changing duties of some individuals to make them more consistent with duties performed by laborers and bringing others into the Classified Service. In Jefferson County, interviews occurred in December of 2007, March of 2008, August of 2008 and September of 2008. The final recommendations should be complete in November. The City of Birmingham information is being summarized and recommendations are being formulated as of this report date.

## **Future Plans**

- Completing the 2008-2009 Annual Classification Survey and beginning the 2009-2010 Survey will be a major focus of the Classification and Compensation staff.
- Reviewing Jefferson County contracts will continue with plans to review the other jurisdictions' contracts as well.
- Reviewing the use of laborers in the jurisdictions.
- Finalizing the development and administering a customized salary survey of selected Merit System job classes.
- Continuing alignment of classification specifications with the job analysis information produced by Performance Measurement.
- Professional Development of the Compensation Advisors to obtain their certificate of Salary Administration.

# EMPLOYEE RELATIONS

## Overview

Employee Relations endeavors to take proactive steps to reduce workplace conflict, prevent unnecessary and costly litigation, and promote positive working relationships within the Merit System. The goal of the Employee Relations (ER) Team is to ensure that employee relations issues are handled effectively and expediently in order to improve workplace productivity and morale.

The department is dedicated to serving the Merit System by functioning as a resource for jurisdictions and by supplying information and assistance as related to matters concerning the Rules and Regulations, policies and procedures, federal and state law (especially the Enabling Act) that impact the Personnel Board and Merit System.

Employee Relations has four FTEs – An Employee Relations Advisor, Employee Relations Assistant, a Team Lead, and a Department Head/General Counsel. In December 2007, Randall Fields resigned as the Team Leader of Employee Relations. In August 2008, Carlos Kyle was hired to the position of Employee Relations Team Leader.

Employee Relations regularly provides information and assistance to employees, elected officials, department heads, attorneys, and the citizenry concerning Personnel Board Rules and Regulations pertaining to:

- Disciplinary appeals (appeals by employees of dismissals, suspensions, or demotions)
- Grievances (complaints filed by employees against other employees or supervisors)
- Paid injury leave appeals
- Citizen's complaints (complaints against employees from non-employees)
- Administrative leave with or without pay
- Fitness for duty examinations
- Reductions in force

## Activities and Accomplishments

During November 2007 through October 2008, Employee Relations received notification of two hundred nineteen (219) employee actions (grievances, disciplinary appeals, etc.). One hundred twenty (120) of the two hundred nineteen (219) actions received were not eligible for appeal in accordance with PBJC Rules and Regulations. Ninety-nine (99) of the 219 actions received were eligible for appeal in accordance with PBJC Rules and Regulations. However, actual appeals were filed in only fifty-two (52) of the 99 actions eligible for filing an appeal (see tables below).

	<b>Not Eligible for Appeal</b>
<b>Suspensions</b>	86
<b>Dismissals</b>	9
<b>Administrative Leave with Pay</b>	0
<b>Reprimands</b>	24
<b>Grievance</b>	1
<b>Total</b>	<b>120</b>

	<b>Eligible for Filing</b>	<b>Actual Appeals</b>
<b>Suspensions</b>	30	13
<b>Dismissals</b>	34	24
<b>Demotions</b>	4	2
<b>Grievances</b>	24	7
<b>Paid Injury Leave (IWP)</b>	6	6
<b>Administrative Leave without Pay</b>	1	0
<b>Total</b>	<b>99</b>	<b>52</b>

Employee Relations staff has the responsibility to assist General Counsel in responding to subpoenas submitted by attorneys and providing documentation maintained in the normal course of business at the Personnel Board. Likewise, Employee Relations staff is charged with preparation and submission of the record for judicial review in the Circuit Court of Jefferson County of any decision rendered by the Three-Member Board of the Personnel Board pursuant to the Rules and Regulations.

## **Future Plans**

Historically, the Employee Relations Department has primarily functioned to process existing complaints, grievances and appeals and other matters through the system for consideration by the members of the Personnel Board.

Employee Relations' goals for calendar year 2008-2009 are outlined below:

1. Have quarterly "Meet and Greet ER Staff" sessions during the year. General topics on the operations and the types of services provided by Employee Relations staff will be discussed.
2. Provide answers to Frequently Asked Questions (FAQs) from Employee Relations in Merit Matters on a regular basis during the year.

3. Develop a referral list of agencies to address frequent inquiries to staff at the front counter in WorkForce Development and Applicant Services (WDAS) Department.
4. Outsource Employee Relations files for imaging/scanning and download images into the PBJC current image system (ImageNow) in an effort to assist in the accessibility of files, researching information and sharing information internally with other departments within PBJC.
5. Work toward becoming more proactive in problem prevention and conflict resolution in order to enhance the services that the staff provides to Appointing Authorities, Merit system employees and the general public.

# RECORDS MANAGEMENT

## Overview

The Records Management Department is the central focal point for processing all personnel actions. This Department processes hire and re-hire actions for regular, provisional, temporary, and other limited appointments, merit increases, leaves of absence, promotions, demotions, transfers, terminations, and all other employee-related personnel transactions. During the reporting period, the generation of certification lists was moved to Workforce Development and Applicant services.

The Records Management Department continually reviews electronic transactions and assures that all system edits and validations are functionally working as designed. In addition, the staff reviews error reports, resolves processing problems, and provides end-user assistance. The Department is responsible for assuring that all personnel actions are consistent with the Rules and Regulations, as well as with PBJC operating policy and procedure.

The Department has six FTEs – four Records Management Specialists, an Administrative Assistant II, and a Team Lead. Records Management was created in January, 2005, to manage the processing of all electronic transactions in PBJC's Human Resources Information Management System (HRIMS). Several of the staff were part of the Lawson and PeopleAdmin development teams and possess a particular knowledge of the functionality of the systems. Greg James, Team Lead, has announced his retirement effective in November.

Actions handled by the Department include:

- Maintenance of Employee History Records
- Requests for Production of Employee Documents
- Processing Personnel Actions
- Administration of the Performance Appraisal Process
- Requests for Transfer
- Requests for Provisional Appointment
- Requests for Emergency Appointment
- Requests for Executive Exempt Appointment
- Requests for Temporary Appointment
- Requests for Administrative Interns

## Activities and Accomplishments

Although the Board's Human Resource Information Management System is working as designed, a challenge being faced by both Records Management and IT is the resolution of personnel actions that do not process to Lawson through the interface utilized by the City of Birmingham. The validations and edits that are part of the system's logic do not allow input errors to pass into Lawson. Additionally, personnel actions are stopped if there is conflicting data between systems, e.g. data entered on a Request for Certification and data subsequently entered on a personnel action form. System functionality requires that all actions be processed sequentially which stops all successor actions if there is an error. This creates a back log of actions that the staff must research and address. These errors have been particularly prevalent in the City of Birmingham and, consequently, the effort (resources) required by both Records Management and IT to maintain the interface file has been greater than expected. The Board's and the City of Birmingham's staff have developed and implemented a new strategy and timeline for clearing actions being stopped in the interface files. To date, there are 6,751 backlogged actions affecting 2,806 City of Birmingham employees.

Since November 1, 2007, the Department has processed the following actions.

Type of Requests	Number Approved	Number Rejected	Total Processed
Provisional Appointments	38	0	38
Transfers (Inter-Jurisdictional)	50	0	50
Reinstatements	24	0	24
Full- time to Part- time	0	0	0
Part-time to Full-time	0	0	0
Emergency Appointments	6	0	6
Voluntary Demotions	10	0	10
Executive Exempt Appointments	22	0	22
Transfers (Intergovernmental)	2	0	2
Interns	49	0	49
Temporary Appointments	13	0	13
<b>In- Basket Actions</b>	<b>6,991</b>		<b>6,991</b>

- During the reporting period, the department successfully implemented its strategy for transferring the paper copies of backup personnel actions into the Board's electronic record retention database (ImageNow).

- Records Management is a highly process-oriented function and relies on the absolute adherence to established procedure in accomplishing tasks. Well documented procedures are necessary. To this end, the Department has completed a revision of its procedure manual.

### **Future Plans**

Records Management will be integrally involved throughout the coming year in testing scripts related to the pending Lawson LSF9 version upgrade. Additionally, Records Management plays a pivotal role in assisting the City of Birmingham in clearing its backlog.

# INFORMATION TECHNOLOGY

## Overview

The role of Information Technology is to provide the infrastructure and support for all of the information network needs of the Personnel Board and to provide technical assistance to the staff, member jurisdictions and the general public using the Board's online information systems. In addition, the department is responsible for the design, development, and maintenance of the Board's web sites. The function is comprised of two units – System Support and Data Management.

## System Support

Activities of the System Support unit include:

- Network Administration
- Systems Administration
- PC Maintenance and Support
- Interface Management
- System Documentation
- System Security
- Backup and Recovery
- Disaster Recovery
- Website Management

The System Support unit has five (5) FTEs – A Network Administrator (IT Manager), Systems Administrator (Interface and Security), PC/Network Technician (vacant), Webmaster and a Business Systems Analyst. The System Support unit supports eighty (80) users, a 24 station training lab, and five integrated IT systems. In addition, the Department is responsible for a bank of remote redundant servers that provide off-site disaster recovery capability. The five integrated systems comprise the Board's Human Resource Information Management System (HRIMS) and are described below:

## Lawson

Lawson is the Board's automated employee records management system. This web-accessed system provides the capability to electronically route employee-related actions from a jurisdiction to the PBJC. These actions might include new appointments of various types, promotions/demotions, transfers, leaves of absence, disciplinary actions, and separations from service. They are stored as part of the employee's virtual personnel file.

## **PeopleAdmin**

PeopleAdmin is the Board's web-accessed application management system. The system provides the capability for applicants to create online applications and to apply to open jobs. Since September, 2004, 51,232 applicants have filed 145,559 applications using the online application. Applications filed average 3,046 per month. PeopleAdmin also provides the capability for jurisdictions to submit requests for and receive certification lists electronically. In addition, PeopleAdmin contains an online Position Description Questionnaire module that is used by jurisdictions to request that new positions be established, to request the reclassification of existing positions, and is used by employees participating in the Annual Classification Survey to provide information about their positions.

## **CareerZone**

Career Zone is the Board's online training registration system. This online application allows Merit System employees to identify course offerings, preview training course content, register for courses, evaluate training received, and maintain transcripts of training courses completed. CareerZone was created in-house and replaces the Aspen system that had previously been used as the Board's training registration system.

## **Sigma**

The Sigma system serves as the Board's applicant tracking system and houses information about applicants relating specifically to the jobs for which they apply and maintains information at each stage of the application process, such as, whether applicants meet the minimum qualifications for the jobs in which they have expressed interest, whether their application information is complete, and whether they are eligible for further testing. Sigma also maintains records of applicant test scores, eligibility registers, and certification lists.

## **ImageNow**

ImageNow provides the Board with document imaging functionality. It allows the PBJC to capture document images, index, store, and retrieve those images online. ImageNow has replaced over two million paper documents to date. It is also an electronic repository for all Merit System employee personnel folders. All hardcopy-related documents pertaining to Merit System employees that come to the Board are scanned and stored in the employees' electronic imaging folders.

## Activities and Accomplishments

A major accomplishment during this reporting period was the upgrade and implementation of the Personnel Board imaging software. This enhancement included updated security features and a document management module. This module will give system users the ability to check documents in and out of the system and will track all document changes.

The Information Technology Department continues to support PBJC departments by providing continuous availability of the Interactive Voice Response (IVR) system. During this reporting period, the IVR system has logged over 28,000 calls from applicants and Merit System employees. The system has handled some 65,000 calls since it was implemented.

The Department continues to pursue an Active Caller Script for Automated Register Purge. This capability will entail auto-dialing all individuals on a given register prompting the recipient to indicate whether he/she wishes to remain active on that register. This is an additional feature to be added or combined with the Board's Interactive Voice Response (IVR) system. The Department has contracted with a vendor and is to begin implementation in November, 2008.

Information Technology continues to replace Board desktop computers according to an established rotation schedule. During this report period, 28 desktop computers were replaced. This completes the computer rotation schedule. According to the Board's decommissioning policy, the decommissioned computers were "wiped" and the hard drives removed for destruction by an off-site vendor. Information Technology is now working with the PBJC Business Officer to coordinate auctioning of the old desktop computer equipment. A tentative schedule for the Jefferson County Annual Auction is May 2009.

The Department completed the design and development of a new website, [www.meritmatters.org](http://www.meritmatters.org). Referred to as My Merit Matters, this site is designed specifically for Merit System employees. The site's features include a newsroom, a discussion forum, and a classifieds section. In addition, the site provides merit system employees information regarding vacancies through out the Merit System, allows employees to post transfer resumes, and provides jurisdictions with the capability to search for transfer candidates interested in their jurisdictions. New functionality recently added provides employees with their rank on any registers on which their name appears and information regarding where their names have been certified.

A major accomplishment during this reporting period was the upgrade of the existing version of Lawson, required prior to the implementation of LSF9. Information Technology implemented a four phased approach to complete the upgrade. During the final phase of this project, the upgrade was installed in the Lawson test environment. Records Management along with the Information

Technology Department performed testing scenarios in the test environment to make sure all modules and interfaces were working correctly. Records Management also tested system HR functionality in the test environment. This upgrade paves the way for Information Technology to start project planning for the Lawson migration to the latest technology which is Lawson System Foundation (LSF 9).

The IT Department is in the beginning stages of implementing a virtual server environment. This environment will reduce required square footage, rack space, power, and cooling, cabling, storage and network components by reducing the sheer number of physical machines. The virtual environment will:

- Reduce IT costs and improve flexibility with server consolidation
- Decrease planned and unplanned downtime for improved business continuity
- Run fewer servers and dynamically power down unused servers to reduce energy costs

Also during this reporting period a comprehensive Network Infrastructure and Disaster Recovery manual was developed. This documentation is a detailed plan that describes the Personnel Board network infrastructure and disaster recovery plan. The network infrastructure portion of this book provides a detailed description of all the equipment used to develop and maintain the network and the disaster recovery portion of the book describes the process and procedures for recovering our infrastructure after a disaster.

During the report period, the IT Department and Records Management began working with the City of Birmingham to eliminate their backlog of personnel actions. This backlog has been created due to uncorrected problems with the City's interface file and input errors that have resulted in almost seven thousand unprocessed actions. This will be a labor and time intensive process that will challenge resources necessary to complete the required LSF9 Lawson upgrade.

### **Future Plans**

- Upgrade the Lawson system to version 9.0. The old version is being decommissioned and all clients are required to upgrade to the new foundation by July, 2009. This foundation and application upgrade will update back and front end processes of our Lawson software with minimal changes to the end user. Member jurisdictions will notice faster response time when retrieving employee records and other pertinent merit system employee information. Migrating to this product will require a significant effort and commitment of resources on the part of the Board and the IT staff.

- Rollout the new [www.pbjcal.org](http://www.pbjcal.org) website. In addition to new functionality, the sites' coding is being rewritten to assure greater flexibility. The site is also being adapted to be more intuitive and user-friendly as well as more accessible by people with visual disabilities.
- Offer jurisdictions the opportunity to utilize the Board's web design and technology. Using the Board's web service as a platform, the following benefits could be achieved:
  - Cost reduction to jurisdictions by eliminating design, development and maintenance of their websites by external vendors
  - User interface standardization increasing web presentation effectiveness
  - Content modification from anywhere through the internet
  - Access to the most current web technology
  - Integrated site usage statistics would provide additional information about their web user's usage and patterns
- Complete the implementation of the virtual infrastructure and decommission the outdated equipment that is replaced by the virtual servers.

## **DATA MANAGEMENT**

The Data Management unit is responsible for supporting the reporting and analysis needs of PBJC departments and jurisdictions. Since the Board has transitioned from a manual to an electronic environment, the ability to design and develop reports and reporting tools and to analyze information contained in the IT systems are critical support functions. The Data Management staff creates standard and ad hoc reports used in decision making, designs and develops databases, creates and maintains salary schedules, audits (certifies) payrolls, and assists other areas of the Board with understanding not only what data is available, but how data can be used to guide strategic planning and to monitor and improve operations. The unit also provides both on-site, hands-on and classroom training to member jurisdictions in the use of the Lawson and PeopleAdmin products.

Currently, the unit maintains a library of eighty-two standard production reports in addition to responding to frequent one-off requests for data from both inside and outside the Board. The standard production reports are posted to the Board's Intranet site for access by all PBJC employees. These reports provide up-to-date information necessary for monitoring compliance activities throughout the Merit System, providing statistical information to the public and to member jurisdictions, and for management decision making. A total of ninety-four ad hoc reports were produced during the report period.

The Data Management staff also assists other Board departments and member jurisdictions in identifying and resolving systems problems by monitoring online processes. In addition this unit is responsible for designing, developing and monitoring process flow – the functionality in the systems that allow transactions to flow appropriately through jurisdictions to and through the PBJC and that triggers notifications, and alerts and routes these notices to appropriate recipients.

The responsibility for the creation of salary schedules has been moved from Records Management to Data Management. In addition, the process of auditing (certifying) payrolls now rests with this department.

Data Management has five FTEs – Two Data Management Specialists, a Systems Analyst and two Data Management Technicians.

### **Activities and Accomplishments**

Data Management has developed a comprehensive training document that defines the business rules for calculating seniority for purposes of awarding

promotion points, for reduction-in-force determinations, and for determining eligibility for examinations. A high level document outlining the business rules for calculating seniority and eligibility has been developed and published to the Board's Intranet. This more detailed document will be used as an internal training document. A total of 2,850 seniority & eligibility points were calculated during this report period.

For the report period ending April 30, Data Management has attended two annual conferences for two different systems – Lawson and People Admin. Lawson is the system that processes and houses the Personnel Actions for all jurisdictions; and People Admin is the Online Application system. A Knowledge transfer training to other Board employees is scheduled for next month.

A new procedure for sending applicants thank you emails and new employees welcome emails was put into production last fall. The applicant letters provide information on how the Merit System hiring process works and the employee letter provides information on resources available through the Personnel Board. Most recently, employees are being electronically notified when their names are certified to hiring departments. For the report period, a total of 22,297 applicant letters, 601 new employee letters and 2,454 referral notifications were sent out.

The Department continues to work closely with end-users to add design features to existing databases to enhance their functionality and to create new databases as needed. A total of twenty-six databases were created for this report period.

An important service offered by the Board to users of its online systems is the PBJC Help Desk. The Help Desk is staffed by Data Management personnel during normal business hours and may be accessed either by phone at (205) 279-3444 or by email at [systemsupport@pbjcal.org](mailto:systemsupport@pbjcal.org). For the report period, the Help Desk had received 12,189 calls and 696 email tickets for assistance.

## **Future Plans**

- Review existing production reports for accuracy and relevancy. Decommission reports not being utilized, and create new management reports as needed.
- Redesign Board databases in web accessible format.
- Convert Board databases to SQL.
- Certify all jurisdiction payrolls quarterly.
- Develop a web accessed Business Information Center to push real-time business data to jurisdictions.