

# The Merit System



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2007 Semi-Annual Report

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The Personnel Board of Jefferson County



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Report Period  
November 1, 2006 – April 30, 2007

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## **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 exempted. 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 2006

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<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>Ann Underwood President Jefferson County Council of PTAs 1312 8<sup>TH</sup> Place Pleasant Grove, AL 35127</p> <p>or</p> <p>2100 18<sup>th</sup> Place North Birmingham, AL 35209</p> <p>744-6167 379-2000 <a href="mailto:lannunderwood@bellsouth.net">lannunderwood@bellsouth.net</a></p>
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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 (as of April 30, 2007) are Tommy Hagler, pastor of a local church, Dr. Lita Clark, a psychologist, and L. Kenneth Moore, an attorney and judge. Dr. Clark serves as the Board Chairperson\*.

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\* Resignation effective May 11, 2007

## **Continuing Role of the Monitor**

On November 15, 2005, the Court issued an order appointing Dr. William Sauser 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 Monitor is an officer of the Court and serves as an observer of the PBJC's activities and progress. He communicates his findings to the Court and the parties. Since November 2005, the Monitor has engaged in the following activities to assist the Board in becoming a more efficient civil service agency:

- Studied documents supplied by the Court and the Personnel Board, identifying the obstacles facing the Board in complying with its Consent Decree
- Toured the facilities and met one-on-one with the entire staff of the PBJC to discuss roles of the Monitor
- Attended at least one meeting of the three-member Board and the Personnel Director each month
- Reviewed the agenda and minutes of every meeting of the Board
- Participated in the pre-conference meetings of counsel, monthly status conferences before the Court, and post-status conference meetings with members of the Board and its counsel
- Met with the Court and Special Master prior to or following monthly status conferences to foster communication between the Court and the Board
- Since November 2005, submitted a "Monthly Report of the Monitor" to the Court, which outlines his efforts and progress.

## **Resignation of Three-Member Board Chair**

Dr. Lita Clark resigned her position as Chair of the Three-Member Board effective May 11, 2007. Judge Linwood Smith appointed and encouraged the Citizens Supervisory Commission to ratify Alfred F. "Buddy" Smith, Jr. as Board Chair (Seat #1) to replace Dr. Clark. The seats occupied by L. Kenneth Moore and Tommy Hagler remain unchanged.

## **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 2006 CSC meeting, the Three-Member Board has decided 24 disciplinary cases, 2 grievances, 2 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 any employee appeals or grievances, as well as administer the standard for Performance Appraisals across the jurisdictions.

See the PBJC's website <http://www.pbjcal.org> for more details.

## 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.

Many of the services provided by the PBJC are regulated by the Personnel Board Rules and Regulations. These Rules and Regulations explain a variety of things from how leave can be accrued and used to the number of days an announcement must be posted. A copy of the current Personnel Board Rules and Regulations may be obtained from the PBJC website at:

<http://www.pbjcal.org/RulesRegsApril2005.pdf>

## 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 to market 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.

**Performance Measurement** is responsible for the development, validation and certification of all entry level and promotional selection procedures within the

Merit System. This includes conducting job analyses, developing selection measures, 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.

**Workforce Analysis** is responsible for establishing classifications for all Merit System jobs, assuring that employees are properly assigned to classifications, and that classifications are appropriately assigned to salary grades. Workforce Analysis 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 Workforce Analysis 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. In addition, Records Management is responsible for processing Requests for Certification for all types of appointments, providing certification lists to hiring jurisdictions, and certifying payrolls.

**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 Since November 1, 2006**

Peter Blank	Training Advisor II
Tamara Brown	Data Management Technician
Kim Kinder	Compensation Manager

### **Employees Promoted Since November 1, 2006**

Latonia Aigbogun	Records Management Specialist
Jeffrey Crenshaw	I/O Psychologist
William Curtis	Systems Analyst
Robert Groce	Network Administrator I
Becky Lopez	Administrative Assistant III

### **Employees Separated from the Board since November 1, 2006**

Mary Preston	Training Advisor II
Andrew Price	Testing Intern
Amanda Winger	Assessment & Development Specialist

# 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 period that demonstrate its commitment to these principles and progress toward its goals.

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

In October 2006, the Personnel Board of Jefferson County administered the Fire Lieutenant Promotional Examination. The examination was administered over the course of three days: October 3, 5, and 10, 2006. During the course of the examination administration, the Personnel Board received an anonymous facsimile which contained confidential test-related information. The Director of Personnel began an investigation immediately, which is on-going. To date, more than 100 people have been interviewed. The investigation revealed that Subject Matter Experts (current fire lieutenants employed in the merit system who participate in test development) violated confidentiality agreements by providing confidential test information to one or more test candidates. These candidates in turn distributed the information to other candidates. The Subject Matter Experts also provided confidential test information to a former Battalion Chief and a Battalion Chief who has since retired. These Chiefs prepared and distributed a handout containing the confidential test information to various candidates for the examination. As a result, the examination was compromised and could not be used for promotional purposes.

To date, the Director has taken and recommended disciplinary action against 16 merit system employees. The Director recommended that seven employees be terminated and nine employees be suspended without pay. Two of the seven employees recommended for termination have since retired. Two of the employees recommended for suspension have reached an agreement regarding the discipline to be imposed and will be serving periods of suspension without pay. The remaining employees have appealed the recommended disciplinary action. Those appeals are currently pending.

In addition to termination or suspension, the Director of Personnel has disqualified the employees from participating in promotional examinations and has removed their names from the list of candidates eligible for promotion.

Neither the Personnel Board nor the general public can tolerate any activity that undermines the integrity of the system. The breach of faith which occurred with respect to this examination compromised testing procedures for a position that is vitally important to public safety in Jefferson County. This type of activity cannot and will not be tolerated.

Professional development is recognized as a critical success factor in achieving excellence. The Board encourages continuous learning and commits funding for training opportunities that advance professional skill and knowledge. In addition to internal training initiatives, Board employees attended numerous external seminars and workshops identified as being both of value to individual growth and development and to furthering the goals of the Board.

In April of 2007, Performance Measurement Division staff members attended the 22<sup>nd</sup> Annual Society for Industrial/Organizational Psychology Conference and will present topics of interest and relevance to the PBJC staff in May 2007. Additionally, this department has encouraged employee development through monthly continuing education meetings, outside training initiatives, and research, presentation, and publication opportunities.

A major initiative for 2007 is the creation, design and development of an ethics training conference for all merit system employees. A planning committee of PBJC and Jefferson County Human Resources staff has begun a search for community partners and ethics experts to advance the initiative. This training will be designed to have a long-term impact on the county.

Early 2007 saw the beginning of a new management training course entitled Merit System Rules and Regulations. This class, which will be offered quarterly, is designed to assist supervisors when dealing with common rules and regulations issues in the merit system.

During the report period, Personnel Board staff attended training sessions on Workplace Safety conducted by a representative of the Sheriff's Department. The



purpose of the training was to provide pertinent information regarding home, vehicle and office safety.

The Board has increased its efforts to audit registers and returned certification lists in an effort to ensure that applicants are being fairly considered for Merit System opportunities and that hiring authorities are adhering to Merit System principles and regulations in the hiring process.

The Board's website is increasingly being used to place information regarding Board operations in the public arena. This includes the accessibility of Board agendas and minutes, hearing notices, financial disclosures, and Board operating policies and procedures.

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

The Board has implemented a number of initiatives designed to increase efficiencies of Board operations. These initiatives have a direct impact on the quality of service delivery to our member jurisdictions and to the public.

The Board continues to work to improve its response time to member jurisdictions. One critical area of focus continues to be how quickly certification lists are generated. The average turnaround time has averaged .40 days for the past six months.

The Performance Measurement Division has reviewed and revised job analysis and test development procedures to ensure the most valid and legal test development activities, while focusing on following the most efficient and least taxing manner for the PBJC's member jurisdictions. This has included the start of a job family approach to job analysis in order to create greater efficiencies in the job analysis and test development processes and reduce costs associated with examinations. Additionally, the Performance Measurement Division is in the process of developing an online Job Analysis Questionnaire (JAQ). The JAQ is being developed to increase the convenience and efficiency associated with collecting job analysis data from subject matter experts within the jurisdictions.

In January of 2005, the Performance Measurement Division was faced with 184 jobs with certification requests and no active registers. As of April of this year, this backlog of jobs has been effectively eliminated and the work within the division has increasingly moved toward jobs where jurisdictions' needs are anticipated. In an effort to accomplish this task, the Division has been working toward creating contacts/liaisons between the Division and the jurisdictions to enhance communication and improve understanding and addressing of jurisdictions' needs.

The Data Management staff of the Board has developed a number of comprehensive management reports that provide feedback on how efficiently and quickly work requests are processing through the Board. This has allowed managers to review work in progress on a daily basis, to establish metrics around work processes, and to measure the effectiveness of work procedures.

Training and Career Development continues to promote its account manager program as a means of interacting with the jurisdictions. Each Training Advisor communicates with their assigned jurisdictions by visits or follow-up phone calls. While this initiative was begun in the prior report period, the effectiveness of these interactions has resulted in ongoing requests for specialized training, such as:

- Windows XP training for Jefferson County
- SPHR/PHR training for the PBJC employees
- A LINK to Civil Service for the community
- Customer Service specific training for Revenue and Cooper Green
- Supervisory Training

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

The Personnel Board has put the timely establishment of eligible registers at the forefront of its goals and mission. The Performance Measurement Department has eliminated the previous backlog of jobs and is currently working on many jobs without current requests in order to anticipate and meet future needs in a more timely fashion and to ensure active registers remain up to date.

Additionally, the Board has continued to conduct monthly meetings with Cooper Green Hospital and Jefferson County Rehabilitation Health Center to help ensure all needs are being met.

Serious efforts were made during the report period to address the jurisdictions' concerns regarding background checks for Public Safety applicants. After researching the matter, it was determined that the Board would need to partner with a jurisdiction(s) in order to obtain background information as such information is only provided to law enforcement agencies; therefore the Board would not be able to independently obtain this type of information.

Based on the Board's findings and following discussions with the Police Chiefs, it was determined that it would not be feasible for the Personnel Board to undertake performing background investigations on public safety applicants. Also, it was determined that even if the Personnel Board were able to obtain background information, the efforts would be duplicated by the jurisdictions. A review of the previous two registers (6/11/04 and 07/29/05) and the current register established 08/06/06 indicated that from a population of 1,679 applicants, there have been only two occurrences of felonies among candidates

certified; consequently, the cost of performing the background investigations both in terms of money and time far out weights the potential benefit.

**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. Quarterly expenditure reports are also presented to the Three-Member Board for review.

In addition, an annual budget workshop was conducted with the Board's management team in April. The purpose of the workshop was to serve as a forum to:

- Communicate to the Personnel Board's managers the organizational goals and budget process for the upcoming fiscal year
- Provide financial information so that managers can better oversee the funds in their respective areas, and be able to communicate to others the services/goals/initiatives that are connected to those funds
- Emphasize that the funds entrusted to the Board are taxpayer dollars and that each dollar that is requested during the budget process must be justified

Last year, the Board implemented an electronic inventory management system to account for all physical assets. In April, the staff completed the annual inventory for FY 2006-2007.

The Board has developed a number of policies and procedures to assist in the operation of the organization. The policies and procedures have been posted to the Board's intranet so that they are widely available to Board staff. During the report period, the Board created new policies regarding Cellular Phone Usage, Family Medical Leave, and Procurement Card utilization, and revised its policy on Bereavement.

The Board has made a substantial investment in its IT infrastructure and has created policies to protect that equipment from misuse. To assure compliance with the Board's policy on introducing unapproved or unlicensed software, during the report period, the IT staff completed a software audit of all desktop computers. The audit did not result in any concerns or evidence of non-compliance.

April saw the successful launch of CareerZone, a new learning management system initiated by Training and Career Development. The development of this system in-house by the Board's IT Department allowed the Board to discontinue

paying an outside vendor license and maintenance fees for this same functionality, a savings in the amount of \$65,000 annually.

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

The Board's web technology continues to be a significant means of communication both internally and externally. The Board maintains three sites, two internet sites and one intranet site. The number of visits to the two internet sites continues to be impressive with April logging the largest number of hits on the JobsQuest site to date. JobsQuest logged 72,120 visits.

The Performance Measurement Division is in the process of attempting to improve the relationships with the jurisdictions by designating a staff member to serve as a liaison for each jurisdiction. This liaison will help ensure jurisdictions know how and to whom to communicate their hiring needs, help provide a clear line of communication, and ultimately allow the PBJC to better anticipate and meet the needs of the jurisdictions.

Last year, a Quality of Life Committee was created at the Personnel Board. The purpose of the committee is to promote team camaraderie and work life balance and fitness. During the second quarter of 2007, a quarterly team camaraderie meeting was held, and several employees have joined together to promote exercise and fitness (activities are scheduled during break and lunch period).

In January, a meeting was held at the Birmingham News to discuss an article, *Fire exam probe costs \$400,000*, written by Barnett Wright and run in the paper's January 24<sup>th</sup> edition. The meeting was arranged by Leslie Coyne with Balch and Bingham, the law firm representing the Board in the firefighter investigation, to discuss factual misrepresentations made by Mr. Wright in the article. During the meeting a number of concerns were expressed by the Personnel Director in an attempt to assure that the Board receives accurate and balanced coverage.

A newsletter, *Merit Matters*, is electronically distributed monthly to all member jurisdictions and to several community organizations providing information of interest to the Board's constituencies. The publication is designed to engage Merit System employees and the general public by presenting timely information that is pertinent to them in a direct and concise manner.

To assist in cross-department communications, meetings of Board administrative and managerial staff are held bi-weekly. One meeting involves the senior leadership group and promotes open discussion of issues relating to the overall management of the organization. A second group brings managers and team leads together to discuss initiatives in their respective areas.

The Board has begun the process of designing a new web site targeting Merit System employees. This initiative is intended to engage employees in issues of common interest, as a discussion forum, and as a vehicle for communication.

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

On November 2<sup>nd</sup>, the Personnel Board, in partnership with the University of Alabama at Birmingham Center for Urban Affairs, hosted a day-long diversity conference for law enforcement leaders throughout Greater Birmingham and the surrounding areas. The conference concluded months of collaboration with community groups, area service agencies, academic leaders, and others in the community who represent the interests of ethnic minorities. Through this initiative, community representatives joined with law enforcement leaders to exchange ideas and seek ways to address both the significant challenges and boundless opportunities afforded by the increasing ethnic and cultural diversity in Jefferson County and Alabama.

In March, the Board's recruitment staff with assistance from Training and Career Development, conducted an orientation and training session directed to female applicants for public safety jobs. The event, Strengthen, Educate, and Train (SET), was offered in collaboration with the Sheriff's Department, the Northeast Alabama Academy, and the cities of Irondale, Birmingham, and Mountain Brook. 60 individuals attended along with three television stations and the Birmingham News.

A needs analysis by Training and Career Development is currently underway to determine the viability of offering selected Training and Career Development classes externally. Possible advantages include community relations, corporate partnerships, and revenue generation.

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

The Personnel Board continued its comprehensive marketing and advertising campaign to inform the public and Merit System employees as to career opportunities that exist throughout the System. Efforts include radio, television, internet, newsprint, trade journals, direct mail, college and university career events, and onsite career events. The Board is advertising its Jobs Quest web site on five strategically located billboards throughout the city and on WBHM-FM radio.

Two staff members of the Personnel Board are active on the Alabama Business Leadership Employment Network steering committee. The Network is a consortium of businesses in Alabama dedicated to the employment and advancement of people with disabilities. The Personnel Board features the ABLE

Network logo on its website as an indication of its support for the employment of people with disabilities in the community.

In April, the Board's recruitment staff sponsored Link to Civil Service, an event to educate the community about the process of entering the Merit System, including the application process. The event included hands-on computer training and instruction in completing the electronic application. Eighty individuals participated in three sessions. This event will be held monthly beginning in June.

## **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.
- Pursue grant funding opportunities to help meet the needs of the jurisdictions we serve.

## **Conclusion**

The Board continues to realize successes and progress toward established goals, such as the elimination of the backlog of jobs with no active registers; 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 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 career 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.

## **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 eight (8) FTEs – three Administrative Assistants; a Recruiting Advisor; two Recruiting Representatives; an Administrative Specialist and a Manager.

### **Goal: Increase quality of applicants for Police Officer/Deputy Sheriff**

Recruiting campaign began on January 21, 2007. 1,364 individuals have applied as of April 30. A total of 1,600 individuals are expected to apply by the end of the campaign on May 18.

The previous recruiting campaign attracted 1,477 applicants. The resulting register contains 697 applicants.

### **Goal: Increase quality of applicants for Entry-Level Firefighter**

Recruiting campaign ended in November 2006. 1,455 individuals applied during the campaign. The resulting register contains 344 applicants.

The previous recruiting campaign attracted 1,424 applicants. The resulting register contained 377 applicants.

### **Goal: Increase Quality of Applicants for Nursing**

The current recruiting campaign will continue through December 31, 2007. Current registers for LPN and Staff Nurse contain 74 applicants as of April 30.

2006 Registers for LPN and Staff Nurse Total 139 applicants.

### **Goal: Increase number of Hispanic applicants for all positions.**

The current recruiting campaign will continue through December 31, 2007. As of April 30, 35 Hispanic applicants have applied for various positions.

The 2006 recruiting campaign attracted 112 Hispanic applicants.

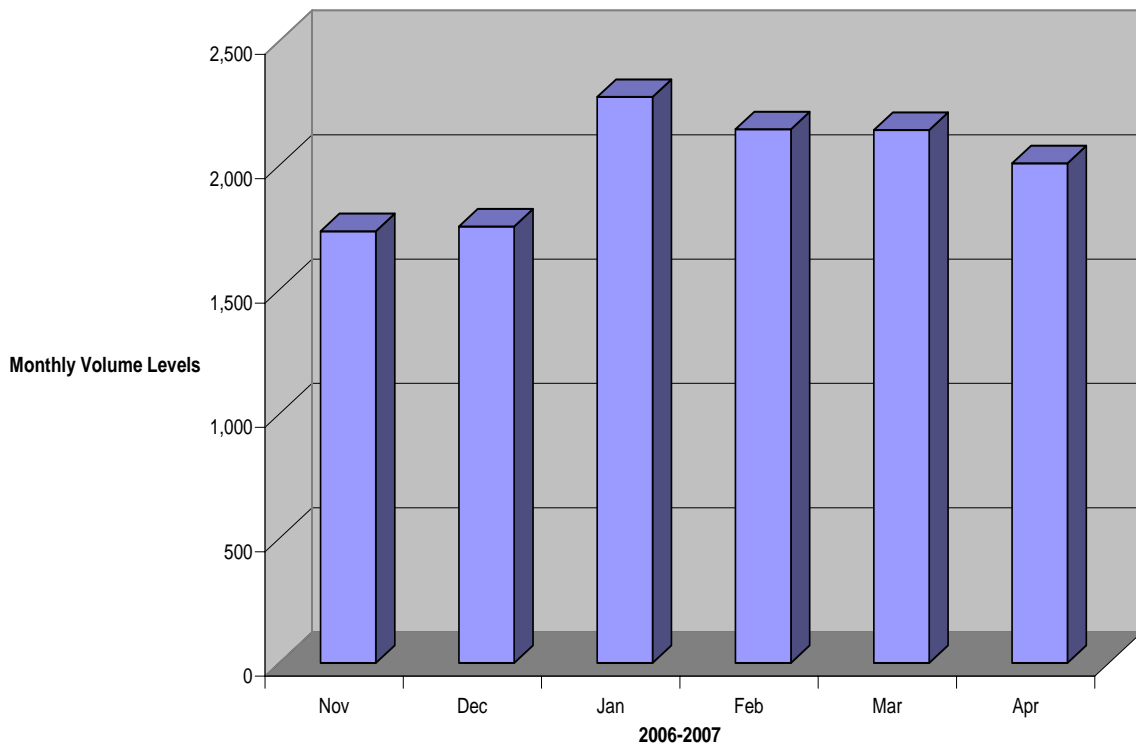


## Applicant Services

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 six months, the staff managed over 12,000 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 and chart below provide total monthly customer contact activities and trends from November 1, 2006 through April 30, 2007

Customer Contact Activities



### Customer Contact Activities

Activity	Nov	Dec	Jan	Feb	Mar	Apr	Total
Computer Kiosk Users	123	119	318	231	242	224	1,257
On-site/Remote Online Users Assisted	83	56	239	179	129	137	823
General PBJC Inquiries	1,105	1,190	1,144	1,286	1,304	1,206	7,235
Non PBJC Inquiries	79	122	118	121	136	115	691
Transfers/Referrals to PBJC Departments	149	82	255	150	163	160	959
IVR Files Processed	47	36	52	20	12	17	184
Emails Processed	150	150	150	159	157	173	916
Total Monthly Volume	1,736	1,755	2,276	2,146	2,143	2,032	12,088

## Recruiting

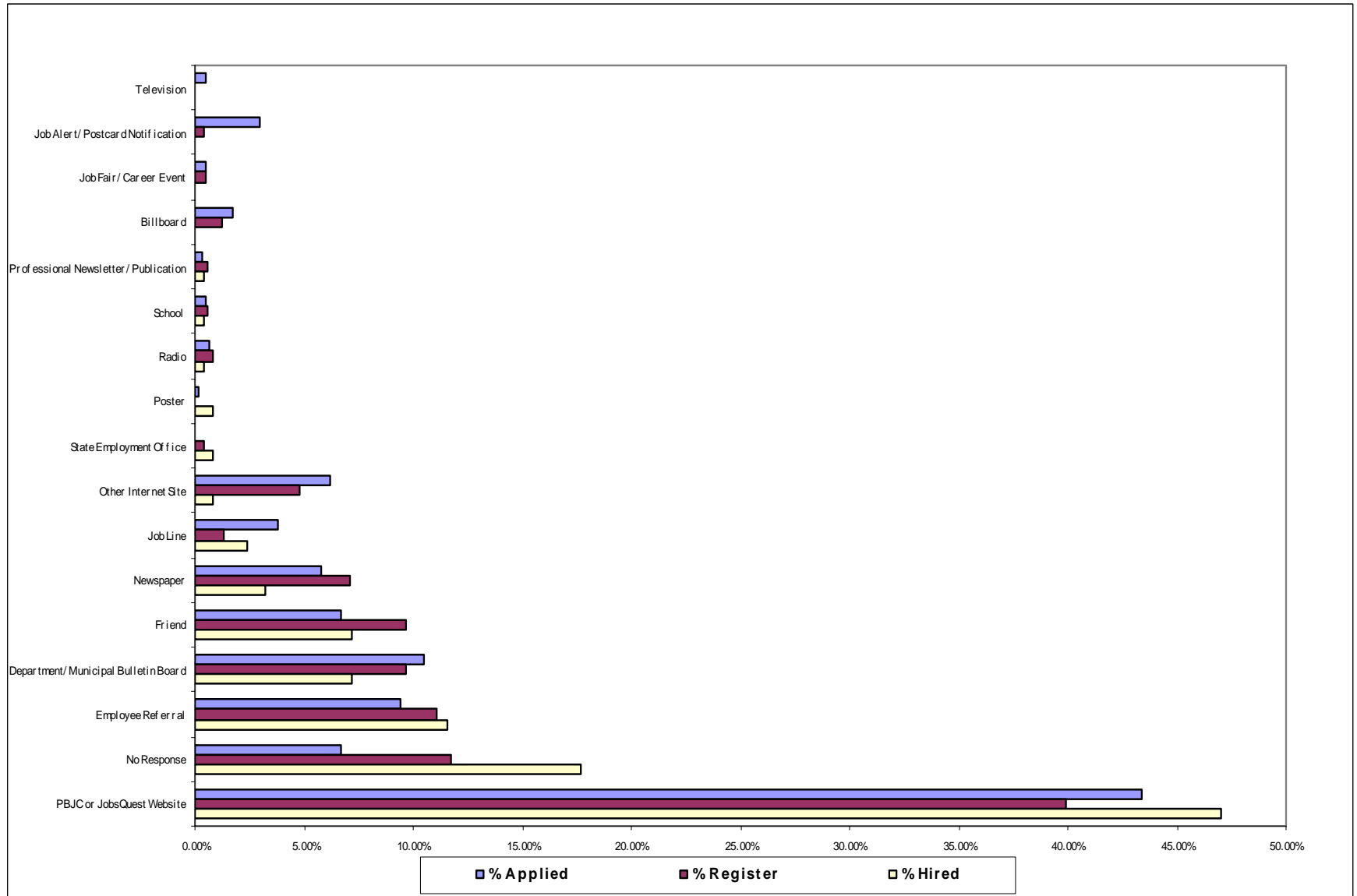
### ***A Comprehensive Approach***

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. WDAS is continuing to recruit outside the borders of Alabama. 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, 2006 through April 30, 2007.

<b>Answer</b>	<b>Applied</b>	<b>%</b>	<b>On Reg</b>	<b>%</b>	<b>Hired</b>	<b>%</b>
PBJC or JobsQuest Website	4,576	43.38%	1,022	39.92%	117	46.99%
No Response	704	6.67%	300	11.72%	44	17.67%
Employee Referral	996	9.44%	285	11.13%	29	11.65%
Department/Municipal Bulletin Board	1,104	10.47%	249	9.73%	18	7.23%
Friend	709	6.72%	249	9.73%	18	7.23%
Newspaper	610	5.78%	183	7.15%	8	3.21%
Job Line	396	3.75%	32	1.25%	6	2.41%
Other Internet Site	659	6.25%	122	4.77%	2	0.80%
State Employment Office	10	0.09%	11	0.43%	2	0.80%
Poster	25	0.24%	2	0.08%	2	0.80%
Radio	69	0.65%	20	0.78%	1	0.40%
School	53	0.50%	15	0.59%	1	0.40%
Professional Newsletter/Publication	33	0.31%	15	0.59%	1	0.40%
Billboard	183	1.73%	30	1.17%	0	0.00%
Job Fair/Career Event	49	0.46%	12	0.47%	0	0.00%
Job Alert/Postcard Notification	317	3.01%	10	0.39%	0	0.00%
Television	56	0.53%	3	0.12%	0	0.00%
	10,549	100.0%	2,560	100.0%	249	100.0%

## Source of Applications



# 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 scope of this responsibility is substantial given the number of job classes in the Merit System and the need to ensure that all work is performed in a manner that is consistent with the relevant employment laws and professional standards. 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, recruiting, and training qualified, volunteer assessors to evaluate candidate performance on employee selection tests
- Conducting assessment centers designed to evaluate candidate performance 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 for employment 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 following sections will outline the major activities and accomplishments of Performance Measurement that have moved the division closer to the stated goal and helped to improve the image of the PBJC.

## Staffing

The Performance Measurement Division currently consists of 31 permanent employees occupying six positions. These positions include Industrial-

Organizational Psychologist, Senior Assessment & Development Specialist, Assessment & Development Specialist, Web Survey & Multimedia Developer, Administrative Assistant III, and Administrative Assistant I.

Since the submission of the 2006 Annual Report, the Performance Measurement Division has experienced turnover in one Assessment & Development position and one intern position. Amanda Winger (Assessment & Development Specialist) resigned from the PBJC in January 2007 to perform consulting work in Atlanta, GA. Andrew Price (Intern) completed his six-month internship in December, 2006. No new employees have been hired in the Performance Measurement Division since the submission of the 2006 annual report.

## **Goals**

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 continues to work diligently to improve the effectiveness of the 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 2007. The progress toward achieving these goals, activities and accomplishments of the division since the 2006 Annual Report is presented in subsequent sections.

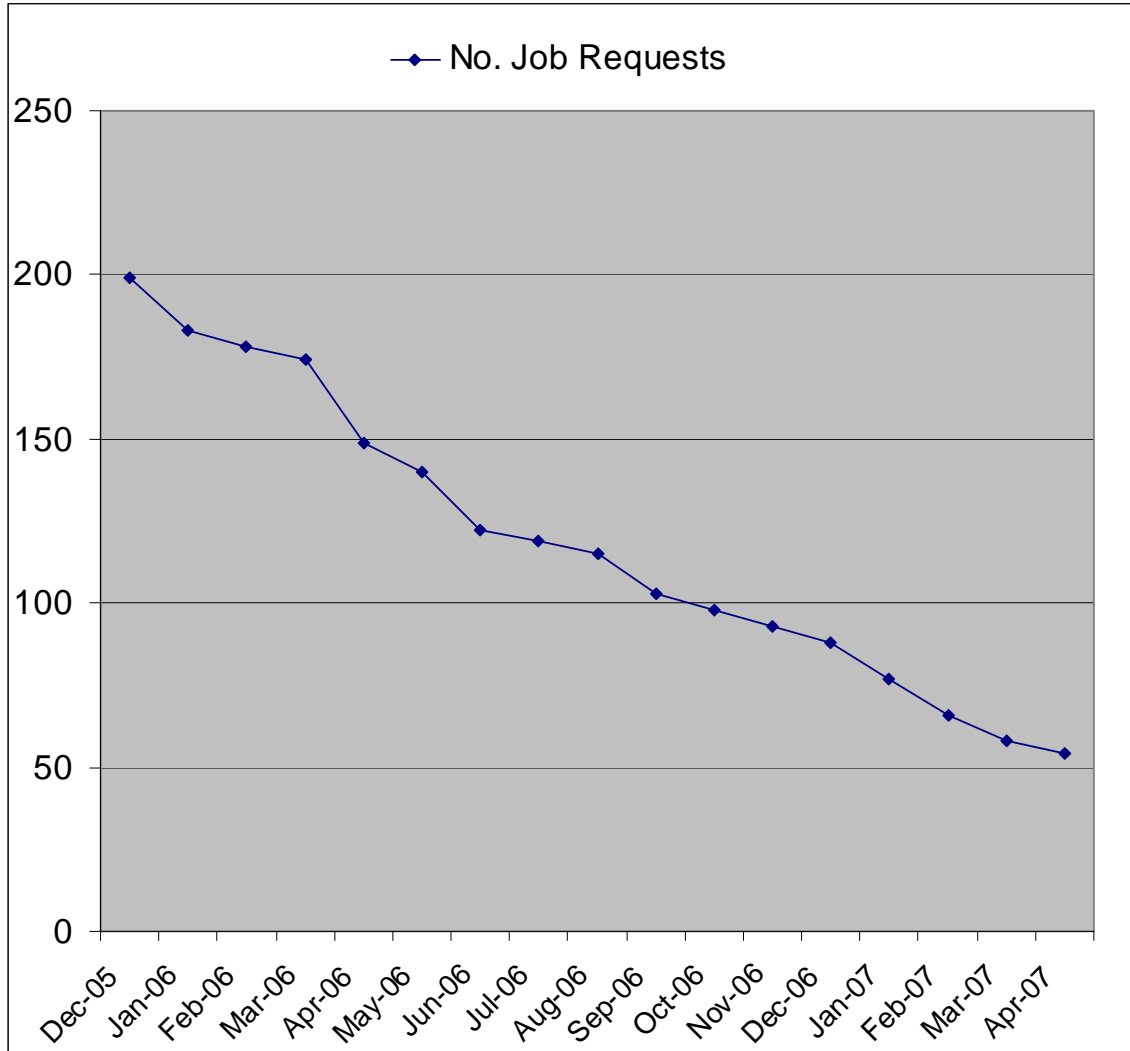
- Develop and administer selection procedures that identify the most qualified candidates for employment in the Merit System
- Develop and implement a job family approach to conducting job analyses and developing selection procedures
- Conduct professional development activities to ensure test development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

### **Goal: Develop and administer selection procedures that identify the most qualified candidates for employment in the Merit System.**

The primary goal of the Performance Measurement Division at the start of the 2007 fiscal year was the elimination of the backlog of jobs in need of eligible registers that has existed since the PBJC's selection procedures were revised under the federal receivership. Since that time, the PBJC has worked to eliminate the backlog and address new incoming requests for eligible registers. The figure below presents a line graph tracking the total number of requests for

certification lists for jobs in which no (or an inadequate) eligible register exists (i.e., requests in “Testing Review”). It should also be noted that of the 56 requests for certification lists in testing review as of May 1, 2007, six are currently announced as open continuous and eligible applications are added to the eligible register and sent to the jurisdictions as they are received.

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



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 unfilled request for certification is in place. There are currently 89 jobs actively being studied and/or tested in order to help more efficiently and effectively meet the hiring needs of the jurisdictions. Since the submission of the 2006 annual report, the PBJC has posted job announcements, tested applicants, and released registers for 125 jobs. A list of these jobs for which registers have been released since November 1, 2006 is presented in the table below.

**Table 1. Registers Released from 11.1.06 through 5.1.2007**

<b>Job Code</b>	<b>Register Title</b>	<b>Job Code</b>	<b>Register Title</b>
0043	Medical Transcriber	3754	Public Health Engineer
0044	Medical Clerk	3760	Air Pollution Instrumentation Technician
0063	Administrative Assistant I	4125	Director, Senior Citizen Center - Irondale
0064	Administrative Assistant II	4161	Recreation Play Leader
0066	Administrative Assistant III	4179	Fitness Center Administrator
0068	Administrative Assistant IV	4321	Aircraft Museum Restoration Technician (Part-Time)
0069	Administrative Coordinator	4327	Exhibit Designer - Southern Museum Of Flight
0115	Legal Secretary	5031	Firefighter
0274	Senior Court Clerk	5038	Fire Battalion Chief I
0275	Principal Court Clerk	5050	Fire Prevention Inspector I
0277	Chief Court Clerk	5151	Emergency Management Officer
0642	Communications Operator I	5246	Plumbing, Gas And Mechanical Inspector
0652	Public Safety Dispatcher II	5255	Building Inspections Officer
0833	Senior Auto Parts Clerk	5265	Plans Examiner
0873	Buyer	5356	Zoning Supervisor
0875	Senior Buyer	5436	Sewer Service Supervisor
0880	Principal Buyer	6355	Deputy Coroner
1005	Senior Auditor	6423	Senior Parking Enforcement Officer
1007	Principal Auditor	6463	Fingerprint Classifier
1073	Business Manager (Non-Medical)	6467	Latent Fingerprint Examiner
1073	Business Manager (JRHC)	6470	Latent Fingerprint Examiner Supervisor
2067	Administrative Services Manager	6551	Security Officer
2085	Senior Administrative Analyst	6553	Senior Security Officer
2087	Principal Administrative Analyst	7036	Case Manager, RN
2090	Education/Training Coordinator	7076	Nurse Manager
2095	Public Relations Coordinator	7095	Staff Nurse – Baylor
2388	Social Services Coordinator	7183	Diagnostic Imaging Technologist-Ultrasound
2390	Mental Health Coordinator-Probate Court	7184	Special Imaging Technologist
2513	Computer Operator II	7271	Physical Therapist Assistant
2535	Data Entry Supervisor	7273	Physical Therapist
2551	Network Systems Administrator I (JC)	7363	Disease Intervention Specialist
2557	Programmer Analyst (GIS)	7373	Environmental Health Specialist
2569	Data Management Technician	7377	Environmental Health Program Manager (Air)
2577	G.I.S. Database Supervisor	7403	Dental Hygienist
2583	Systems Analyst Multi-Platform	7540	Patient Activity Leader
2733	Air Pollution Information Analyst	7544	Patient Activity Director
2829	Records Management Specialist	7626	Health Services Project Administrator
2830	Workforce Analyst	7746	Senior Nutrition Consultant
2849	Training Advisor	7747	Nutrition Services Coordinator
2850	Personnel Technician	7850	Director Of Customer Services And Health Plans
2853	Personnel Analyst I	7879	Director, Jefferson Rehabilitation And Health Center
2966	Community Development Specialist - Community Projects	7881	Administrator Outpatient Care
2966	Community Development Specialist - Housing Rehabilitation	7903	Pharmacy Technician



2971	Human Resource Planner	8021	Herbicide Applicator
2979	Chief Human Resource Planner	8031	Truck Driver
2981	Director Of Economic Development	8033	Refuse Truck Driver
2991	Economic Development Analyst	8035	Brush And Trash Supervisor
3075	Architect	8065	Construction Supervisor
3078	Chief Architect	8111	Shop Helper
3086	Senior Planner	8135	Power Meter Technician
3089	Principal Planner	8175	Tire Shop Supervisor
3111	Chief Civil Engineer	8180	Maintenance Mechanical Supervisor
3112	Flood Plain Administrator	8183	Small Engine Mechanic
3170	Deputy Director of Roads & Transportation	8267	Senior Arborist
3319	Traffic Sign Painter	8281	Green House Worker
3486	Senior Engineering Inspector	8283	Green House Gardener
3487	Principal Engineering Inspector- Inspection/Construction	8287	Landscape Crew Leader
3487	Principal Engineering Inspector-Surveyor	8451	Water Utility Service Helper
3673	Land Acquisition Agent	8451	Water Utility Service Helper
3674	County Property Manager	8453	Water Utility Service Worker-Bessemer
3675	Senior Land Acquisition Agent	8475	Water Distribution Supervisor
3676	Chief Land Acquisition Agent	8534	Cabinetmaker
3724	Soil Scientist		

**Goal: Develop and implement a job family approach to conducting job analyses and developing selection procedures.**

In order to more efficiently and effectively study jobs for purposes of developing valid, fair, and legally defensible selection procedures, the Performance Measurement Division has set a goal to implement a job family approach to conducting job analyses. A job family approach will improve the current 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
- Creating a more efficient and cost effective selection process by identifying common selection requirements across related jobs.

The process of reaching this goal involves the testing of new procedures, making revisions to those procedures to address any unanticipated problems or issues, training of the Performance Measurement staff on the procedures, and sharing the details of the process with the jurisdictions. Currently the PBJC is near the completion of conducting job analyses for all jobs within one job family using this

approach. Once this job family is complete, the Performance Measurement staff will review the process, identify strengths of the process and areas for improvement, revise the procedures as necessary, and implement the process for one job family for each of the five teams of analysts within the Performance Measurement Division.

**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 2006.

In 2006, the Performance Measurement Division established a practice of conducting monthly “continuing education” presentations/discussions to ensure that staff stays up-to-date on developments in the field of employee selection and industrial/organizational psychology. The activities involved include: (a) identifying topics/research relevant to employee selection and other job-related issues, (b) assigning books, employment laws, chapters, and/or scientific journal articles covering the topic of interest, and (c) meeting to discuss thoughts and/or ideas regarding the topic and its applicability to the work performed in the division. Topics covered since the submission of the 2006 Annual Report include:

- Adverse Impact, including the Uniform Guidelines’ definition, relevant case law, statistical methods of calculating adverse impact indicators, and interpreting the results of these analyses.
- Critical scores in employee selection tests. Discussion centered around the applicability of setting critical scores for Merit System tests and the manner in which critical scores should be evaluated.
- Setting cut scores for selection tests. Discussion included the definition of cut scores, the difference between cut scores and critical scores, employment/case law relating to the legal appropriateness and defensibility of setting cut scores, the applicability of cut scores for Merit System tests, and the manner in which cut scores should be set and evaluated.

In addition to conducting the continuing education sessions, the Performance Measurement Division also sought the following outside developmental opportunities.

- In March 2007, four individuals from the Performance Measurement Division participated in an assessment process for entry level firefighter for the City of New Haven, Connecticut. These individuals were trained and performed the

assessment process. Upon completion of the assessment, they provided feedback regarding the process by highlighting similarities and differences when compared to the PBJC processes and shared any activities or procedures they felt could be beneficial to incorporate in the PBJC's processes.

- The Performance Measurement Division sent representatives to the Society for Industrial and Organizational Psychology (SIOP) 22nd Annual Conference in New York, NY on April 27-29, 2007. Conference attendees will present topics of interest and relevance to the work at the PBJC to Performance Measurement staff in May 2007.
- Brian Bellenger, Ph.D. conducted a presentation in a doctoral consortium held at the 22nd Annual SIOP Conference on April 26, 2007. The consortium was designed to provide doctoral students realistic expectations for work within the field of Industrial & Organizational Psychology and tips for establishing their career. This also provided an opportunity for Dr. Bellenger to share the many advances in selection being utilized by the PBJC and to promote the PBJC as an excellent organization from which employees gain valuable selection experience.

**Goal: Improve the sharing of information obtained by Performance Measurement with other departments.**

The Performance Measurement Division has established a Register Tracking Database to facilitate the sharing of information regarding eligible registers with the Records Management Department. The database has been populated with data on all currently active registers. The data are being checked for accuracy before the database is fully utilized. This database will help ensure accurate information regarding job announcements, job shreds outs, and all active eligible registers is available for Records Management in an easily accessible, accurate, and timely fashion.

The Performance Measurement Division is also working on the development and implementation of an electronic task and KSA collection, storing, and reporting system. This system will allow for easier questionnaire development, more efficient administration of questionnaires to SMEs, and easily accessible reports for obtaining data on Merit System jobs. This system will greatly enhance the ability of the Performance Measurement Division to share job analysis information with Classification & Compensation, which will allow for greater consistency between classification specifications and job announcements and easier classification of positions.

## **Goal: Improve communication between jurisdictions and Performance Measurement**

Developing effective relationships between the PBJC and its member jurisdictions is key to providing effective customer service. In order to improve these relationships clear lines of communication are necessary. To this end, the Performance Measurement Division has been working toward establishing persons to serve as contacts/liaisons between the division and the member jurisdictions. Contact has been made with several jurisdictions in order to begin improving the communications between the PBJC and its member jurisdictions. Scheduling of initial face-to-face meetings between the liaisons and the appropriate point persons within each jurisdiction is underway. The goal of these meetings will be to open lines of communication, update the jurisdictions on the PBJC's progress toward greater efficiency and effectiveness of service, and to outline an appropriate manner of communicating upcoming employment needs.

### **Moving Forward**

Overall, the Performance Measurement Division has made significant strides toward achieving its goals presented for 2007. The short-term interim goals are being set to ensure that the division remains on pace to achieve all goals outlined for the year. The Performance Measurement Division believes that continued progress toward achieving the outlined goals and greater collaboration among departments will lead to continued improvement of the functions and services provided by the division and the overall organization.

# TRAINING & CAREER DEVELOPMENT

## Overview

The Training and Career Development Department (Training) 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.

The Training Department values its role as a partner in a "learning community" with Merit System jurisdictions, Jefferson County agencies, businesses, colleges and other institutions. As Jefferson County changes, socially, politically and economically, employees serving its citizens have new training needs. Through collaborative efforts with community partners, Training can access a wealth of human and physical resources for training Jefferson County employees. Affiliation with this "learning community" broadens the Department's problem solving capacity and leads to better solutions.

The Department schedules and presents quarterly calendars of core-curriculum training in computer software, human relations, customer service, supervision, management and leadership. It works collaboratively with other Merit System training functions, including the City of Birmingham and the Jefferson County Health Department training staffs, to share resources and prevent duplication of services. It works with local educational institutions, agencies and businesses to share information, ideas and resources to reach mutual goals. Increasingly, Training is responding to requests from Appointing Authorities and department heads for training courses located onsite at the jurisdictions.

Training and Career Development is approved for staffing of six FTEs - four Training Advisors, one Personnel Technician (formerly Training and Career Development Assistant) and a Team Leader. In April, PBJC approved hiring of a new Training Advisor, Peter J. (Pete) Blank. He will be the primary management and supervisory trainer, replacing Mary Preston, who moved out of state. Pete will be the primary management and supervisory training instructor, along with performing other duties.

Pete is from Orlando, FL, where he spent the past 13 years working at the Walt Disney World® Resort. His most recent role was as a Learning Manager at the Disney University, where he designed, developed and delivered Career and Professional Development courses for cast members and employees across the Disney organization. Prior to that, he taught college level courses for students

who were enrolled in the Disney College Program internship. He also spent 4 years in the operations side as a Guest Service Manager at Disney's Port Orleans Resort. Prior to Disney, Pete worked for 2 years as a sports reporter at a local television station in Birmingham.

The Department is now staffed by: Evelyn Ray, Training Lead; Helena Bewley, Training Advisor; Pete Blank, Training Advisor; Josh Gilliam, Training Advisor; and Genae Raines, Personnel Technician.

## **Activities and Accomplishments**

Since its inception four years ago, the Training Department has steadily evolved in its scope and influence. Evidence of this growth includes increased course offerings, increased use of online course registration with a learning management system, increased requests for classes onsite, and inclusion in PBJC strategic goal setting. During 2002-03, much of Training's efforts consisted of startup activities such as hiring staff, developing a vision and mission, outlining strategic goals and purchasing the furnishings and equipment needed for training. In 2003-04, the Department conducted jurisdiction needs assessments, identified a core curriculum, and began presenting a monthly calendar of training classes. In 2004 and early 2005, the emphasis was on developing and presenting training on PBJC's new computer systems for the Board and jurisdictions. During 2006, the Department has been able to break new ground with a substantial training focus on the County's changing cultural demographics and its impact on our civil service workforce. This focus is reflected in the law enforcement conference and the Spanish language instruction class described in this report.

Following are highlights and accomplishments for the last year November 2006 through April 2007.

## **PROJECTS**

### **Update and Enhance PBJC Rules and Regulation Class**

The first session of the new Supervisory Certificate course, Merit System Rules and Regulations, attracted 28 employees from 15 departments. Jurisdictions attending included Bessemer, Homewood, Irondale, Jefferson County and Vestavia Hills. Presenters were the PBJC Manager of HR Information and Technology Services and the PBJC General Counsel. They facilitated discussion and answered questions about the rules most referenced by supervisors.

The class is a required course for the PBJC Supervisory Certificate and consists of scenarios that give participants the opportunity to apply the Rules in addressing common supervisory issues. The course will be offered quarterly.

## **Entry Level Computer Skills to Support Project Monticello**

Training modified course materials for Entry Level Computer Skills for Jefferson County personnel. The special one day class provided basic computer skills on Microsoft Windows XP for employees working with Project Monticello, the name given to the County's transition from the mainframe TAG system to the SAP enterprise resource management system. Included were more than forty employees from Purchasing, Roads and Transportation, General Services and Environmental Services.

## **PHR – SPHR Certification Preparation Classes**

Training received requests from fourteen PBJC employees interested in a class to help them prepare for Professional Human Resources (PHR) or Senior Professional Human Resources (SPHR) certification. In response to these requests, Training developed a delivery strategy to best meet the needs of fellow PBJC employees. In the first half of FY 2007, Training obtained SHRM (Society of Human Resource Management) and HRCI (Human Resource Certificate Institute) materials, secured facilitators, created study groups, and delivered training sessions.

Holding a PHR or SPHR certification is the highest designation a Human Resource professional can achieve. Preparing fellow PBJC employees to successfully achieve certification is a task not undertaken lightly. PBJC employees who gain a SHRM certification will be better equipped to perform their daily roles, and will add innumerable value to the Personnel Board of Jefferson County as a leading edge Human Resource organization.

## **“A LINK TO CIVIL SERVICE JOBS” Training Sessions**

On April 11, 2007, Training and Recruiting partnered to provide the *first-ever* training sessions open to the public on how to successfully connect to the cities that hire employees in Jefferson County. These filled-to-capacity sessions provided valuable information on the hiring process, including the application, the testing, the job register and the certification list. They also provided attendees the opportunity to complete and submit an on-line application for employment.

In an effort to better serve our stakeholders, future plans are to offer these sessions on a more frequent basis.

## **Jurisdiction Meetings**

Training Advisors continued to meet with jurisdiction managers to elicit, present and confirm training opportunities. Included were onsite visits to the Jefferson County Health Department, the City of Birmingham Fire Department, City of Birmingham Personnel, and Trussville Police Department. Plans were also discussed with Trussville police training officers to schedule an area-wide supervisory class for Trussville, Irondale and Leeds.

Requests were received for training from the Jefferson County Revenue Department and from the Cooper Green Nursing Education Coordinator. The Revenue Department is interested in customer service, supervisory management and stress management classes. Cooper Green needs general supervisory training such as communication skills and coaching to supplement internal programming specific to Cooper Green policies and procedures for the nursing services managers. Meetings are planned with representatives of these departments to discuss these needs and to develop an action plan to incorporate their employees into ongoing programs.

## **TRAINING'S SPECIFIC DEPARTMENTAL GOALS FOR FY 2007**

### **Complete development and implement CareerZone Learning Management System.**

**CareerZone** officially went live on April 23, 2007. This was the culmination of many months of hard work, dedication, and partnering between the Training team and the IT staff. **CareerZone** is a Learning Management System (LMS) that provides a much easier and efficient registration process for employees and Training. The new system, designed by IT personnel, allows users to:

- Register for computer and management training classes on-line
- Print out the official PBJC quarterly calendar
- View all the course offerings electronically at a glance
- View and print their training record, or list of classes successfully completed
- Create a personalized schedule of training

### **Develop and implement a Merit System Orientation for new employees from all jurisdictions.**

The Training team is currently finalizing a Merit System Orientation class for new employees from all jurisdictions. This class will orient all new hires with the basic information they need once they become a part of the Merit System in Jefferson County. This class will be piloted in July 2007. Steps taken include:



- Development of a potential agenda with input from Performance Assessment, Records Management and Administration
- Communication of potential agenda to Appointing Authorities, with feedback received from Bessemer, Trussville and Homewood
- Development of training materials for sessions: Merit System Overview; Rules and Regulations for New Employees; Managing Your Civil Service Career; and Creating a Respectful Workplace

The class outline and the first module, Merit System Orientation, Part 1: Overview and Part Two: Rules and Regulations for New Employees, have been completed. Significant work is complete on the PowerPoint presentation and instructor guide for Creating a Respectful Workplace. The Director has reviewed concepts and suggested additions. A final section, Managing Your Civil Service Career, is still in progress.

**Evaluate training required to supplement the existing law enforcement curriculum for diversity used by police and sheriff’s training academies.**

As a continuation of the 2006 law enforcement conference initiative for leadership training in diversity, Training did web searches and contacted the three of Alabama’s police academies to determine what is being offered, gaps and opportunities for possible new offerings in diversity training. The Birmingham Police Academy responded by encouraging Training staff to attend their new recruit training to see first-hand what is included. Information about other academies was received primarily through websites.

Currently, basic academy training at Birmingham includes Cultural History, Perceptions of Cultural Groups, and Strategies for Effective Cultural Contacts. The Academy does not provide ongoing training for recruits who pass the Academy and become officers.

Training determined that the following areas covered by California’s comprehensive “LD42” curriculum would complement local academy offerings:

- Workplace Harassment (Title VII, ADA)
- Racial Profiling
- Hate Crimes

Training currently offers a Workplace Harassment course and is researching partnering with Alabama’s Institute for Criminal Justice Education (ICJE) to offer additional diversity courses. The ICJE is a nonprofit Alabama corporation that provides law enforcement training, develops courses and distributes research material relating to investigation, management, and technology in the criminal justice arena. This non-profit agency partners with Faulkner University in Montgomery in providing a very robust APOST certified curriculum of law enforcement courses for continuing education at little or no cost.

One avenue for Training may be to work with ICJE in providing an ongoing curriculum of diversity topics, with Training coordinating and ICJE providing trainers. Classes could be offered at PBJC, inviting all jurisdictions' law enforcement officers.

**Develop plans to market supervisory skills certificate class, including supplementing courses available, refining content from current classes and finalizing marketing tools.**

The PBJC Supervisory Certificate Program has been advertised prominently on the Training page link on the PBJC website. Employees can see what courses are required and how to enroll. Based on promotional activity and announcements made during PBJC classes, Training has experienced a continual increase in enrollment in the program.

Because the supervisory curriculum is dynamic, with new courses anticipated, Training has decided the paper brochure is an inefficient way to market the curriculum. Instead, the Department will produce and update fliers about the supervisory certificate that will be included in a "kit" provided to local appointing authorities and by using referrals to the online learning management system for up-to-date information and course registration.

After participating in the February Rules and Regulations class, two employees from Roads and Transportation have already completed requirements for the PBJC Supervisory Certificate Program. Training is currently defining a plan on recognition of employees who complete the program.

Training is currently in the planning phase of an overall marketing strategy for its offerings. Brainstorming meetings were held in late April, and a viable marketing action plan will be presented in late May 2007.

**Provide second workforce innovations training, focusing on ethical workplace behavior for Merit System employees.**

Training is laying the groundwork for workplace ethics training in 2007. Considerations include determining:

- The goals
- The target audience
- What individuals should gain from the program
- How to get input for shaping the program
- The most effective format for the training

Currently, a planning committee of staff from Training and Jefferson County's Human Resources Department is organizing an expanded community-based

advisory committee to collaborate on this Merit System ethics training. To-date Samford School of Business Dean, Scott Beck, and Southern Institute of Business and Ethics representative, Susan Scott-Trammell, have agreed to participate in the planning committee.

### **Pilot Spanish program to meet needs of firefighters and EMS personnel.**

Training worked with the City of Birmingham Fire Department to organize and plan a second pilot class of Spanish for Firefighters. The first pilot was held with the assistance of Fairfield and Bessemer in the fourth quarter of 2006.

One pilot ended on March 27 with a total of 16 attendees. Although a majority of attendees were Birmingham firefighters, dispatchers and firefighters also came from Homewood, Bessemer, and Mountain Brook. Training developed supplemental material to complement Workplace Spanish<sup>®</sup> material designed specific to Firefighters, EMS, and Dispatchers. During the pilot, trainees were also encouraged to access an on-line application, Rosetta Stone, which was available for their use, free of charge, through the PBJC.

Evaluations for the pilot were positive, with recommendations including shortening the class times to 2 ½ hours, continuing some form of class offering that would go deeper than “job-specific” Spanish, and periodic refresher classes. A second Spanish class began on April 24. These classes were planned to accommodate the firefighter rotation schedules.

### **Marketing training spaces to the public for classes with seats available after Merit System employees have registered.**

Training has created a project plan to investigate the viability of this option. A kickoff meeting has been set for May and will include representatives from several PBJC departments. Training will research best practices throughout the Southeast, both in the public and private sectors, which will enable us to best position our Training to the community.

### **Define a training plan to prepare administrative assistants to compete for promotional positions in the administrative job series.**

Training met with Performance Measurement to schedule entry level computer skills training in advance of administrative promotional exams for employees on a voluntary basis. Classes will be scheduled and offered to potential candidates in June. A more detailed analysis of what types of training will be needed for each level of the administrative job series will be conducted as a basis for developing other training.

**To work with Recruiting to offer the first Strengthen, Educate and Train (SET) orientation to increase success rates of females in completing the law enforcement academy.**

On Saturday, March 31, sixty one women attended the first highly successful SET orientation at the Birmingham Police Training Academy. Sixteen law enforcement representatives (from the Jefferson County Sheriff's Department, the Birmingham, Mountain Brook and Irondale Police Departments, the Northeast Alabama Police Academy and the University of Alabama in Birmingham) presented informative and first-hand perspectives that included the Merit System hiring process, APOST standards, and details on life as a female law enforcement officer. Female officers and deputies demonstrated physical fitness and firearm tips, and led tours of the Birmingham facility including its obstacle course. Female bicycle police, a female SWAT officer and a female canine officer also participated. Birmingham Police Chief Annetta Nunn spoke at lunch about her personal experience in moving up the ranks, and how she balanced family and work. Laptops were set up so that those who attended could apply online if interested; seven participants completed applications.

The PBJC thanks the sponsors of the event:

- The Birmingham Order of the Fraternal Police provided SET tee shirts
- Buffalo Rock and Golden Flake provided refreshments
- The Jefferson County jail provided lunch

The event was heavily attended and received day-of-media coverage by all major local television stations. Coverage included interviews on Good Day Alabama, on-news shows that focused on the upcoming event and the changing opportunities for women in public safety. The Birmingham Police Information Officer assisted with press releases to print media. Feedback from participants was excellent.

Training and Recruiting are planning another SET orientation in the summer of 2007.

# **WORKFORCE ANALYSIS**

## **Overview**

Workforce Analysis is responsible for establishing classifications for all Merit System jobs, assuring that employees are properly assigned to classifications, and that classifications are appropriately assigned to salary grades. Workforce Analysis 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 Workforce Analysis 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 of reclassification requests initiated by jurisdiction authorities, as well as requests for new positions; the creation of new classifications, the deletion or collapsing of existing classifications; the review of requests for advanced steps; the review and analysis of labor market data; 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 Workforce Analysis Department is currently staffed with four FTEs. A new department manager, Kim Kinder, was hired effective April 30, 2007, to replace Nancy Cleveland. Ms. Kinder comes to the Board as a Certified Compensation Professional with over sixteen years of experience in compensation administration. Valerie Johnson-Pettaway remains temporarily reassigned to the department to assist during the Annual Classification Survey.

## **Activities and Accomplishments**

The principal activity of the Workforce Analysis Department during the reporting period was the conduct of the 2006-2007 Annual Classification Survey that kicked-off on July 1, 2006, and concludes with a Public Hearing on May 18, 2007.

During the conduct of the Survey, Position Description Questionnaires (PDQ) for one thousand one hundred three (1,103) positions were submitted and reviewed. This represents 73% of the population of employees eligible to submit PDQs. Two hundred five (205) individuals were interviewed by the Workforce Analysis staff. This resulted in twenty eight (28) recommendations for reclassification. Eighteen (18) appeals were subsequently filed, only four (4) of which were on matters appealable to the Board. A public hearing is to be held on May 18, 2007.

Communications with employees about the Survey process through their respective appointing authorities continues to be a challenge. As a means of addressing this problem, all information relating to the Annual Survey is accessible by employees on the Board's web site, [www.pbical.org](http://www.pbical.org), and all information regarding outcomes and recommendations is communicated via the Board's Interactive Voice Response (IVR) system.

Classifications in the following job families were included in the 2006-2007 Survey:

General Administration	Museum
City Clerk	Civic Center/Auditorium
Probation	Civil Defense
Parole/Social Work	Coroner
Legal	Public Works Maintenance/Operations
Statistical	Mechanical/Auto Maintenance
Personnel Administration	Utility Services
Community	

In addition to the Survey-related activities reported above, for the report period ending April 30, 2007, the Department staff created seven new classifications, approved one hundred thirty eight new position requests, reclassified eight positions (outside the Annual Survey process), reviewed and approved seventy two advanced step requests, and participated in five labor market surveys.

New Classifications Created:

- Records Analyst II
- Records Manager
- Payroll Specialist
- Risk Manager
- Aircraft Museum Restoration Technician
- MDS Coordinator
- Occupational Therapist

Also during the report period, the Workforce Analysis staff began a process of coordinating classification specifications with job analysis information collected by Performance Measurement. 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.

## **Future Plans**

- Planning and implementing the 2007-2008 Annual Classification Survey will be a major focus of the Workforce Analysis staff during the coming months.
- A new tool has been developed by Data Management that will allow the staff to begin the process of recalibrating the factors and assigned points that is used to measure internal equity across classifications in the Merit System.

# 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 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 (4) FTEs – An Employee Relations Advisor, Employee Relations Assistant, a Team Lead, and a Department Head/General Counsel.

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 2006 through April 2007, Employee Relations received notification of 191 employee actions (grievances, disciplinary appeals, etc.). 109 of the 191 actions received were not eligible for appeal in accordance with PBJC Rules and Regulations. 82 of the 191 actions received were eligible for appeal in accordance with PBJC Rules. However, actual appeals were filed in only 44 of the 82 actions eligible for filing an appeal (see tables below).



	<b>Not Eligible for Appeal</b>
<b>Suspensions</b>	63
<b>Dismissals</b>	4
<b>Reprimands</b>	23
<b>Command Discipline</b>	4
<b>Administrative Leave with Pay</b>	15
<b>Total</b>	<b>109</b>

	<b>Eligible for Filing</b>	<b>Actual Appeals</b>
<b>Suspensions</b>	32	12
<b>Dismissals</b>	36	21
<b>Demotions</b>	5	2
<b>Grievances</b>	8	8
<b>Paid Injury Leave (IWP)</b>	1	1
<b>Administrative Leave without Pay</b>	0	0
<b>Total</b>	<b>82</b>	<b>44</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. The Employee Relations Department has increasingly implemented efforts to become more proactive in problem prevention and conflict resolution in order to enhance the services that staff provides to Appointing Authorities, Merit system employees and the general public.

Employee Relations' goals for the remainder of calendar year 2007 is outlined below:

- In January 2007, the Three-member panel of the Personnel Board approved the Disciplinary Guidelines which had been developed by the Employee Relations Department. In order to be more service-oriented,

ER staff is planning to hold brief monthly meetings beginning in July 2007 to address questions and answers for Merit System employees and Appointing Authorities on the disciplinary appeals process. At these sessions, ER staff will provide copies to participants of the Disciplinary Guidelines and reference other pertinent materials used in the appeals process.

- In February 2007, the Employee Relations Department demonstrated the functionality of the ER database to the Training staff. At that time, there was discussion about the Training staff incorporating data from the ER database in their training sessions on topics that covered discipline of employees, (i.e., Supervisory Training, Legal landmines) and any other special presentations for jurisdictions. Training staff also inquired about the capability of reporting features from the ER database that would be beneficial for their purposes (i.e., statistical data). ER staff indicated that the database was under revision and that they would check with the IT Department about this type of added feature. ER staff would like to implement the database for internal use by August 2007.

# RECORDS MANAGEMENT

## Overview

This Department is the central operations unit and point of contact for processing all personnel actions. The Records Management 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. In addition, the Department generates and issues certification lists.

The Records Management 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 continually reviews electronic transactions and assures that all system edits and validations are working as designed. In addition, the staff reviews error reports, resolves processing problems, and provides end-user assistance.

The Department has eight (8) FTEs – four Records Management Specialists, two Personnel Assistants, an Administrative Assistant, 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.

Actions handled by the Department include:

- Creation of Certification/Recertification Lists
- Maintenance of Employee History Records
- Requests for Production of Employee Documents
- Certification of Payrolls
- Processing Personnel Actions
- Administration of the Performance Appraisal Process
- Reinstatement to Registers
- Production of Salary Schedules

## **Activities and Accomplishments**

The Board's integrated electronic HR system has now been operational for twenty-eight months. Post-implementation challenges have been successfully addressed by the Records Management staff and the system is operating as designed. The interfaces between the individual systems that comprise the HRIMS have been fine tuned and well documented through the combined efforts of the IT and Records Management staffs.

A challenge being faced by both Records Management and IT is the resolution of personnel actions that do not process to Lawson through the interfaces utilized by Jefferson County and 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. When one action errors-out, all future actions on an individual are stopped. This creates a back log of actions that the staff must research and address. These input errors have been more prevalent than was initially anticipated and, consequently, the effort (resources) required by both Records Management and IT to maintain the interface files has been greater than expected. There has been improvement in recent months as the jurisdictions' payroll coordinators have become better trained and more actions are being cleared than are being stopped in the interface files.

Since November 1, 2006, the Department has processed:

- Six hundred sixty seven (667) Requests for Certification for one thousand two hundred eighty seven (1,287) positions.
- Nine hundred ninety nine (999) certification lists. The average time between receipt of a request in Records Management and issuance of the list was .40 business days.
- Five thousand three hundred seventy two (5,372) personnel actions.

During the report period, Toni Reynolds-Aigbogun was promoted from Examination and Certification Assistant to Records Management Specialist, replacing Ivy Brown who resigned in 2006. The Examination and Certification positions were collapsed into Personnel Technician and the title Examination and Certification Assistant was eliminated from the Merit System.

## **Future Plans**

- An ongoing goal of the Department is to improve the efficiency of its processing procedures. Over the past twelve months, the Department has achieved an average turnaround time for processing certification lists of .40 business days, a .65 day decrease from the previous report period. This

accomplishment is a major milestone in the Board's effort to deliver lists of candidates to requesting jurisdictions in a timely manner.

- Even though significant strides have been made toward conducting Payroll Certification of all jurisdictions' payrolls (the module has been developed and tested and Payroll Coordinators trained), it remains a significant goal for Records Management. Payroll Certification is a process whereby the payrolls of jurisdictions are programmatically compared to Lawson values and exception reports are automatically generated. A payroll is certified when the exceptions are cleared. In addition to reconciling pay, the process also provides a way for Records Management to identify and reconcile differences with regard to personnel actions related to the employment status of the jurisdictions' employees. Payroll Certification is a joint initiative between Records Management and Data Management. It is the goal to begin Payroll Certification during the summer quarter.
- Substantial progress (60%) has been made toward complete cross training of all Records Management staff, and cross training remains an important goal of the Department. The intent is for Records Management staff to move from specialist roles to that of generalist.
- 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 assure the integrity of the Department's operations; consequently, the creation and maintenance of detailed documentation is a critical success factor. This effort is 70% complete.

# 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
- PC Maintenance and Support
- Interface Management
- System Documentation
- System Security
- Disaster Recovery
- Website Management

The System Support unit has four (5) FTEs – A Network Administrator (IT Manager), Systems Administrator (Interface Manager), PC/Network Technician, Webmaster and a Business Systems Analyst. The System Support unit supports eighty (80) users, a training lab, and five integrated IT systems. These systems are:

## 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 applicant management system. The system provides the capability for applicants to create online applications and to apply to open jobs. Since September, 2004, 33,665 applicants have filed 103,690 applications using the online application. Applications filed average 3,240 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 Learning Management System (LMS). 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. CareeZone was created in-house and replaces the Aspen system that had previously been used as the Board's LMS.

### **Sigma**

The Sigma database 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 two million paper documents to date.

## 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, 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.

Currently, the unit maintains a library of ninety-one 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.

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 and developing 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.

Data Management has four FTEs – Two Data Management Specialists, a Systems Analyst and a Data Management Technician. Vincent Curtis was promoted to the position of Systems Analyst in April. Tamara Brown joined the staff as Data Technician in February and serves functionally as the department's Help Desk Analyst. The Data Management staff report to the Board's Network/Systems Administrator II, Roosevelt Butler. Mr. Butler serves as the first-line manager of the IT unit.



## Activities and Accomplishments

A major accomplishment during the report period was the development of a comprehensive disaster recovery plan. Phase 1, which consisted of developing, creating, and implementing the clustered environment, was completed in December, 2006. During Phase II, the staff will focus on configuration and implementation of remote system access and the development of a comprehensive recovery protocol. In case of a disaster at the 2121 building, the board staff will be able to work from any location with internet access by connecting directly to the equipment housed by the City of Birmingham IT Department.

Visits to the Board's web sites, [www.pbjcal.org](http://www.pbjcal.org) and [www.jobsquest.org](http://www.jobsquest.org) continue to increase. During April, JobsQuest saw the largest number of visitors of any prior month at 72,120. For the report period, JobsQuest logged 282,144 visits and pbjcal.org logged 184,423 visits. In addition, during the report period, 222,970 Job Alert emails were sent to prospective applicants. Job Alert is an automated feature of JobsQuest that electronically notifies applicants of jobs being advertised in which they have previously expressed interest.

In addition, the Board's intranet site has been further developed. The Intranet serves as the repository of official Board operating policies and procedures, management reports, internal forms and business documents, and serves as the major vehicle for communication of official information within the Board itself. All interoffice forms on the intranet site have been reconfigured as online forms. Efforts are underway to incorporate work flow into the forms processing to eliminate the need for manual routing.

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 [www.systemsupport.org](http://www.systemsupport.org). For the past six months ending April 30, the Help Desk had received 4,681 calls and 341 email tickets for assistance.

Development of a Web-based Learning Management System (LMS) was a high priority goal for IT. The IT staff worked closely with staff from Training and Career Development in developing the functional specifications and testing the product before release. This system went live on April 23<sup>rd</sup> and replaces the current Aspen system. Called CareerZone, the new system incorporates all of the functionality currently needed by the PBJC, including course descriptions, course registration, course evaluations, tracking of courses taken by employees, and the ability to offer computer-based training (CBT).

Because the Performance Measurement Division has increased its production of registers, significant time has been spent during this report period by the Data

Management staff calculating eligibility and seniority points for promotional registers. These calculations are critical to proper placement of employees on promotional registers as well as on lay-off lists and for assuring proper bumping rights during reductions-in-force. Calculations totaled 1,634 instances of seniority points.

Idea Integration, Inc, a partner with Microsoft Corporation, was engaged to review the Board's new Exchange clustered environment in November 2006. Idea Integration had previously performed a health check-up on the Board's Active Directory in June, 2006, and found that the installation complied with Microsoft standards. This second engagement was to assure that Exchange 2003 had been properly installed and that the installation configuration optimized and utilized performance with Active Directory.

Idea Integration, Inc. generally found the installation to be satisfactory and made several suggestions to improve the efficiency and stability of the new clustered exchange installation/environment. These recommendations are being implemented as part of the implementation of the Board's Disaster Recovery Plan.

Information Technology replaces Board desktops according to a rotational schedule that assures all PCs are capable of running state-of-the-art software. As part of this rotation, 15 new computers were installed during the report period. According to the Board's decommissioning protocol, the decommissioned computers were "wiped" and the hard drives removed for destruction by an off-site vendor. The computers were then sent to the Jefferson County warehouse where they will be held until auctioned online by Durham Auctions. Proceeds of the auction will be returned to the PBJC.

Data Management is replacing all Access databases with SQL technology. SQL will provide a central repository for all applications and will increase the efficiency and speed of data retrieval. The new SQL environment will also offer more robust and flexible data warehousing capabilities. SQL has been configured and installed in the test environment. Applications will be developed and tested in this environment before being moved to the production environment where it will be used for official use by the staff. Data Management staff was trained in Sequel server technology during the month of February.

## **Future Plans**

- Increasing the Board's web presence continues to be an important goal. To this end, a committee has been formed to begin designing an employee site that will include such features as discussion rooms, Merit System news, information regarding legislative activities affecting civil service, Q&A sessions with the Director, employee profile pages, etc. The intent is to create a forum for the PBJC to interact more directly with Merit System employees,

to keep abreast of what is on their minds, and to provide a mechanism for sharing information of mutual interest.

- The Department maintains an interest in bringing a register purge script online utilizing IVR functionality. This script will auto-dial all individuals on a given register and, following verification, allow the call recipient to telephonically indicate whether they wish to remain active on that register. The information will then be uploaded to the Board's applicant tracking system (Sigma) to accomplish the register purge. Further development of this functionality will cost approximately \$17,000 which is not budgeted for FY2006-2007.
- The calculation of seniority points is an important activity of the Board. Seniority points are calculated for a number of reasons including reductions-in-force, eligibility for testing, and promotion points. Consequently, their accurate calculation is critical. A custom module to auto-calculate seniority was developed and tested as part of the Board's HRIMS; however, the module must be populated with initial values. These values must be manually derived – a very labor and time-intensive process. This remains as an extremely important goal and resource challenge for the Board. A plan is in place to begin the effort of populating the module by the end of the report year.
- An upgrade to the Board's Image Now software is scheduled for the 4<sup>th</sup> quarter.
- Lawson is decommissioning Version 8 of its product. This will require clients to upgrade to Lawson Foundation 9.0 (LF9). Migrating to this product appears to require a significant effort and commitment of resources on the part of the Board and the IT staff. Research is currently underway to determine the effort and resources required. Implementation is scheduled to begin in November or December 2007.