

# SEMI-ANNUAL REPORT

## 2005 - 2006



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## Table of Contents

OVERVIEW.....	1
History of the Personnel Board of Jefferson County .....	1
Citizens' Supervisory Commission (CSC).....	1
Three-Member Board.....	4
Transition of Authority from Receiver to Three-Member Board.....	4
Appointment of Monitor .....	5
Appointment of Personnel Director .....	5
Resignation of Three-Member Board Chair .....	5
Plans for PBJC Training and Orientation .....	6
Three-Member Board Appeals.....	6
Personnel Board of Jefferson County Services.....	6
Rules & Regulations .....	7
PBJC's Service Functions.....	7
ADMINISTRATION .....	9
Applicant Services .....	17
Recruiting.....	18
PERFORMANCE MEASUREMENT .....	23
Staffing.....	23
Goals.....	26
Developing and Administering Selection Procedures .....	27
Vacancy Projection Data.....	29
Staff Development .....	30
TRAINING & CAREER DEVELOPMENT.....	35
WORKFORCE ANALYSIS .....	42
EMPLOYEE RELATIONS .....	44
RECORDS MANAGEMENT.....	46
INFORMATION TECHNOLOGY .....	48
System Support .....	48
Data Management .....	49

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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 nineteen (19) municipalities throughout Jefferson County are part of the Merit System. These nineteen 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 ten-thousand (10,000) 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**  
**May 16, 2006**

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VACANT

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The Citizens' Supervisory Commission must have 9 members present at their meetings in order to conduct business. The Bessemer Women & Youth Association is no longer in existence.

## Three-Member Board

The PBJC is governed by a three-member Board. Board members are appointed by the CSC and serve staggered six-year terms. The current PBJC Board Members are Tommy Hagler, pastor of a local church, Juanita Hull, former Police Captain and Lita Clark, a psychologist. Juanita Hull is the current board chair.

### Personnel Board Members

Capt. Juanita Hull  
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## Transition of Authority from Receiver to Three-Member Board

As stated in the November 2005 report to the CSC, all powers, duties and functions vested in the Receiver were returned to the three-member Board in July 2005. Accordingly, in January 2006, the Receiver submitted a Final Report to the Court. In his Final Report, the Receiver stated in his recommendations for the post-Receiver Personnel Board, "Perhaps for the first time in its 70-year existence, the Personnel Board is fully equipped to discharge its personnel selection functions in an exemplary fashion, and in full compliance with state and federal law."



## Appointment of 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; and
- Since November 2005, submitted a "Monthly Report of the Monitor" to the Court, which outlines his efforts and progress.

## Appointment of Personnel Director

In November 2005, the three-member Board selected Lorren Oliver, the Deputy Director of Personnel, as Director of Personnel. The three-member Board believes that his leadership will facilitate compliance with the Consent Decree and enable the PBJC to be a model civil service agency.

## Resignation of Three-Member Board Chair

Captain Juanita Eaton Hull has recently announced her resignation from her position as Chair of the three-member Board, effective on July 1, 2006, or upon the election of her successor by the CSC, whichever occurs first. Captain Hull's successor will be selected by the CSC.

## Plans for PBJC Training and Orientation

The PBJC will host a training and orientation program for the three-member Board, the Board's Appointing Authorities, and the CSC. Currently, the proposed topics to be covered in the program include three-member Board governance, the structure of the Merit System, the PBJC's role in the development of selection procedures, the Martin litigation, the PBJC's relations with Appointing Authorities, and financial accountability issues.

## Three-Member Board Appeals

The three-member Board has continued to actively review employee disciplinary appeals from decisions of hearing officers. Since the November 2005 CSC meeting, the three-member Board has decided 15 disciplinary cases and five grievances.

## 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 classification 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, leave of absences, merit increases, job classification changes, and voluntary or involuntary separation.
- Managing and facilitating employee relations and employee 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 detail.

## Rules & 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 analysis, 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, 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, leave 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 provide technical assistance to jurisdictions using the PBJC online information systems.

## **ADMINISTRATION**

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 the Merit System, for establishing and maintaining positive and productive relationships with member jurisdictions, administering the proper management of the Board's assets and serving as a conscientious steward of public resources.

Administration is responsible for:

- Ensuring compliance of 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 budget

### **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.

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

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.

Members of the Performance Measurement Department attended the 21<sup>st</sup> Annual Society for Industrial/Organizational Psychology Conference in Dallas, Texas in order to stay up-to-date on legal and professional developments in the area of employee selection.

During the report period, all PBJC employees attended workplace harassment training conducted by the Board's Training Department. This training was

designed to provide information to Board employees about what constitutes workplace harassment, to provide an open forum for discussing harassment issues, and to foster a work environment based on professionalism and mutual respect.

The Training Department offered a course in Legal Landmines to both member jurisdictions and to PBJC staff. This course was designed to address a broad array of workplace legal issues and to teach supervisory personnel and others how to avoid potential difficulties that can arise in the course of managing today's work environment.

The Board has implemented an internal structured interviewing process used to screen and hire candidates for Board vacancies. The purpose is to assure uniformity and compliance with legal guidelines in the interviewing, evaluation, and hiring of PBJC employees.

A major initiative by the Board during the report period was to implement procedures for reviewing the jurisdictions' use of Independent Contractors and laborers as service providers. The *Enabling Act* of the State of Alabama establishes the authority and obligation of the Board to review such contracts and/or use of unclassified personnel to assure that the use of non-Merit System personnel does not effectively evade the purposes of the *Act*. The Board has communicated its concern in this area to appointing authorities and has instituted a procedure for the routine review and quick turnaround of such agreements.

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

The Board has implemented or is in the process of implementing 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 has installed an Interactive Voice Response (IVR) system that provides caller information telephonically twenty-four hours a day, seven days a week. Callers can access the IVR by dialing (205) 279-3400. The IVR provides information to callers concerning their rank on a register, a test score, and online system logon ID's. Callers can validate their employee information contained in the Board's HRIMS, such as employee number, title, date of birth, rate of pay, grade, and step. In addition, the IVR was used to disseminate results of the Annual Classification Survey to over one thousand participating employees. Since November 1<sup>st</sup>, the IVR has received over seven thousand calls.

The Board continues to work to improve its response time to member jurisdictions. One critical area of focus has been how quickly certification lists are generated. The Board's Human Resource Information Management System

(HRIMS) has made it possible to eliminate the time it once took to manually generate and mail certification lists to hiring jurisdictions. This is now an electronic process. The average turnaround time is currently 1.67 days from receipt of a request. A goal is to reduce this to one day.

In July, 2005, the Board designed and implemented a new online Position Description Questionnaire (PDQ) based on a prototype PDQ used during the 2002-2004 Five-Year Survey. This new PDQ instrument is fully automated and has a workflow feature that automatically routes the document through an employee's supervisory channels for review and comment. It is now used for all new classification and reclassification requests. The PDQ is a part of the Board's PeopleAdmin product which also contains the online application and online position requisition (Request for Certification).

The Performance Measurement Department 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.

Another example of the Board's commitment to improving the efficiency of its operations can be found in the design of its state-of-the-art testing facility. The use of this facility has resulted in substantial increases in the efficiency with which examinations can be prepared and administered, resulting in the development and release of more timely registers.

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

The expeditious development and release of registers to address the backlog of jobs is a critical Board initiative. The Board has formulated highly-trained work teams to aggressively tackle this backlog, while, at the same time, preserving the integrity of job analysis and test development procedures.

The recruitment of highly qualified candidates for employment has become an equally important strategic imperative of the Board. To better meet the recruitment needs of the jurisdictions, Guy Dewees was hired as Manager of Workforce Development and Applicant Services in December, 2005. Guy previously served in various professional and management capacities with AmSouth Bancorporation and brings a wealth of recruiting experience and knowledge of the employment market to the Personnel Board.

In support of this initiative, the recruitment staff has worked to identify target audiences of applicants for critical positions in such areas as public safety and healthcare. This has entailed consistent collaboration and communication with Merit System law enforcement professionals and the management of the System's healthcare agencies.

To further support this initiative, the Board released its new Jobs Quest website in January, 2006. This site is designed to better promote the Merit System as an employer of choice in the greater Birmingham employment market. The site provides job search capability, direct access to the Board's employment application, and a job alert feature that notifies potential applicants by email when jobs are posted to the site in which they might be interested. This site can be accessed at [www.jobsquest.org](http://www.jobsquest.org).

Responding to questions from jurisdictions about the proper application of the Rules and Regulations and the *Enabling Act* has been advanced with the employment of the Board's in-house legal counsel. LaVette Lyas, who had previously served as an Assistant Attorney General with the State of Alabama, joined the PBJC staff in January, 2006.

Providing training to jurisdictions is yet another key initiative of the Board. The Board's Training Department bases its course offerings on (1) needs analyses conducted periodically throughout the System, (2) Board initiatives such as new online systems or the promulgation of new Rules, and (3) specific requests for training to address jurisdiction-specific needs. Training is provided both in the Board's training facilities as well as on-site when requested by a jurisdiction.

The Performance Measurement Department established monthly meetings with Cooper Green Hospital and Jefferson County Rehabilitation and Health Center in order to better understand the needs of these agencies and provide improved service.

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

As part of the board's new organizational structure, a Business Manager, Cynthia Holiness, was hired in 2005 to establish internal budgetary and financial controls in the management of all Board assets. Cynthia came to the Board from AmSouth Bancorporation where she served as Assistant Vice President for Portfolio Management. She holds a Bachelor's in Accounting and a Masters in Public and Private Management.

The Board has implemented an electronic inventory management system to account for all physical assets and has recently completed a comprehensive asset inventory.

For its 2006-2007 budget year, the Board has implemented a zero-based budgeting procedure that requires Board managers to justify and document to the Business Manager and the Director of Personnel the need for the monies requested in their budget lines.



Along this same line, department managers are strictly accountable for the expenditures in their respective areas and receive monthly financial statements to review.

The proper and efficient utilization of funds is being aided by the Board's electronic systems. For example, a report is generated each month for the Manager of Workforce Development and Applicant Services that reflects the source of applicants that month. This allows the manager to closely monitor how effective the various advertising efforts have been and to target those that consistently yield the highest return. A similar report is produced reflecting race and sex distribution that allows the manager to target sources that might yield more equitable distribution in applicant flow.

The Board has developed policies and procedures to assist in the operation of the organization. These 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 revised its policies on business travel, petty cash, and tuition reimbursement and created a new policy regarding the rental of motor vehicles from the Jefferson County fleet.

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

In 2005, as a means of being more open with and accountable to the public, the Board instituted a practice of posting its annual budget on its website for easy access and review.

The Board's new online systems have created learning challenges for jurisdiction personnel, particularly when turnover in the jurisdictions occurs. Because the Board recognizes this and recognizes how valuable just-in-time training can be, staff of the Board's Records Management and Data Management departments regularly train and assist jurisdiction personnel one-on-one at their work site.

Beginning in January, 2006, bi-weekly meetings were initiated to assist in cross-department communications. 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.

In order to recognize the staff of the PBJC for their tremendous efforts, an Employee Appreciation Luncheon was held in April, 2006.

A Quality of Life Committee was created at the Personnel Board in February, 2006. The purpose of the committee is to promote team camaraderie and work life balance and fitness.

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

Many of the initiatives, efforts, and accomplishments already mentioned above were designed as value added propositions. Certainly, the Board's investment in its electronic systems has significantly increased the ability to process information quickly and efficiently. The over seven thousand calls received by the IVR system are representative of an effort previously handled manually by staff members. The reduction in time required to transmit paper documents through the mail and to be manually processed by staff has been made possible by electronic data processing and workflow functionality. The ability to perform ROI analysis on advertising source data is capability afforded by the Board's online applicant management system. The Board's online application and Jobs Quest site allows the job seeking public 24/7 access to the employment process.

The Board's value proposition also involves the creation of hiring registers, not only expeditiously, but that include highly qualified candidates. To this end, the Workforce Development and Applicant Services Department has put together a comprehensive recruiting strategy to market the Merit System as an outstanding employer with the end goal being to increase the number of highly qualified and competent candidates from which jurisdictions may choose.

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

The Personnel Board is engaged in a 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 has worked hard to make its websites both accessible and informative. They contain a significant amount of detail about the Board and its operations and can be accessed at [www.pbjcal.org](http://www.pbjcal.org) and [www.jobsquest.org](http://www.jobsquest.org).

As a means of increasing the Board's presence in the community, the staff is encouraged to become involved in broader community initiatives and to engage in extracurricular activities that reflect positively on the Board. In April, 2006, approximately ten staff members represented the Personnel Board at the March of Dimes WalkAmerica, raising over \$1000 for the event. Staff members also represented PBJC in the 2005 Jingle Bell Run for Arthritis.

Staff are also encouraged to make professional presentations at seminars and conferences as a means of sharing initiatives and accomplishments with professional colleagues. During the report period, several Performance Measurement staff members conducted a two-day training seminar for the

Alabama Association of Public Personnel Administrators (AAPPA) covering legal issues and practices related to employee recruitment, selection and retention.

Members of the Performance Measurement Department have submitted a symposium topic to be presented at the 30<sup>th</sup> Annual International Public Management Association Assessment Council (IPMAAC) conference in July, 2006. This presentation will cover the PBJC's use of video and technology-based selection measures and the development of testing facilities designed to aid in this type of testing.

Likewise, Performance Measurement staff have submitted an article to be published in the June, 2006, edition of the International Public Management Association – Human Resources (IPMA-HR) News. This article will provide an overview of video-based testing and how it is used at the PBJC.

### **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 10,000 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 in which we serve.

### **Conclusion**

The Personnel Board of Jefferson County has realized many successes to date in its efforts to reengineer its operations and to transform itself into an efficient, effective organization, but still faces challenges. One significant challenge is to address the use of Independent Contractors and laborers throughout the Merit System. The use of contractors and laborers to provide services in the jurisdictions appears to be a pervasive practice. While their use is not prohibited by statute, the *Enabling Act* clearly establishes an obligation on the part of the Board to assure that their use does not threaten the validity of the civil service

system. It is incumbent on the Board to monitor the use of contractors and laborers, but in so doing, not substitute the Board's business judgment for that of an appointing authority or to otherwise interfere with the conduct of a jurisdiction's business. The Board will work diligently to walk this line between preserving the integrity of the Merit System and the autonomy of its member jurisdictions.

## 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 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 for assistance.

### Applicant Services

#### *Laying the Foundation for Improving Customer Service*

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 fields 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 9,000 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, certificate and licenses to applicants’ online applications. A private research firm has been contracted to benchmark and monitor customer service levels. This information will provide the key to understanding customer perception and therefore the opportunity to continually improve customer service levels. The table below provides customer contact activities and trends from November 1, 2005 through April 30, 2006.

#### Customer Contact Activities

	Nov	Dec	Jan	Feb	Mar	Apr	Total
Computer Kiosk Users	247	165	173	139	299	204	1227
Computer Kiosk Users Provided Assistance	122	73	78	61	158	108	600
Remote Online Users Provided Assistance	79	98	93	31	32	19	352
General PBJC Inquiries	663	682	806	589	861	596	4197
Non-PBJC Inquiries	149	168	134	145	142	119	857
Transfers/Referrals to PBJC Departments	337	257	330	145	256	150	1475
Emails Processed	50	35	70	50	150	110	465
Total Monthly Volume	1647	1478	1684	1160	1898	1306	9173

## Recruiting

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

Recruiting for such a wide variety of positions requires a comprehensive recruiting 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. WDAS has taken the first steps at recruiting outside the borders of Alabama to meet the needs of the jurisdictions in order to meet the needs of their changing communities. Below is a listing of the various avenues and channels used in the past six months to create awareness of the Civil Service Positions in the Jefferson County Merit System.

- Television Advertising
  - BET
  - A&E
  - MTV
  - Turner South
  
- Internet
  - JobsQuest.org (The Personnel Board's new recruiting site)
  - Monster.com
  - Latpro.com
  - AL.com
  - ACHCA.org

- Radio Advertising
  - 95 Jamz (Birmingham)
  - 103.7 The Q (Birmingham)
  - Mega101 (Houston, Texas)
  - 99 Jamz (Miami, Florida)
  
- Career Events and School Fairs
  - On-site Law Enforcement Recruiting Event
  - Jefferson County Workforce Development Career fair
  - Alabama State University
  - Lawson State Community College
  - Wallace State Community College
  - Jefferson State Community College
  - University of Alabama Tuscaloosa
  - University of Alabama Birmingham
  - Auburn University
  - Miami-Dade College
  - Mississippi State University
  - North Alabama Connection
  - Jacksonville State University
  - Gadsden State Community College
  
- Print Advertising
  - The Birmingham News
  - The Birmingham Times
  - The Gadsden Times
  - Miami Herald
  - Houston Chronicle
  - Jobs Weekly
  
- Grass Roots Campaign
  - Community Centers
  - Churches
  - United Way Agencies
  - Direct Mail to recent and past applicants
  - Neighborhood Associations
  - Hispanic Chamber of Commerce
  - College and University Contacts
  - HICA (Hispanic Coalition of Alabama)
  - International Soccer Game Sponsorship

## ***Technology***

With the implementation of The Personnel Board's new recruiting web site [www.jobsquest.org](http://www.jobsquest.org) in February, searching for positions in the Jefferson County Merit System has never been easier. Applicants can quickly search and view positions as well as ask the system to send them an email for positions as they become available. The site is maintained by the Personnel Board's Webmaster and therefore continual improvements can be easily implemented. WDAS is in the process of contacting all jurisdictions with web sites to ensure that there is up to date recruiting information as well as a link to JobsQuest on their sites. A branding campaign for the site is in development and will be implemented over the next six months.

## ***Targeted Recruiting - Law Enforcement***

Several municipalities throughout the nation are experiencing significant shortages in law enforcement applicants. WDAS has taken aggressive steps to ensure that law enforcement applicant interest and volume remains strong in Jefferson County. WDAS used a broad approach using radio, television, newspaper, and internet advertising, as well as a grass roots campaign, and college and professional career events. Many of the Jefferson County Law Enforcement Departments have expressed the need for Spanish-speaking officers to reflect the growing Spanish-speaking community. WDAS targeted concentrations of Hispanic citizens in Central and Northeast Alabama with newspaper advertising and a grass roots campaign to establish relationships with many Hispanic organizations. WDAS also targeted some of the nation's highest concentrations of Hispanic populations in Miami, Florida and Houston, Texas with radio, newspaper, and internet advertising. These efforts are beginning to produce results, with more than three times the number of Hispanic applicants and a twenty-nine percent increase in total applicants over last year.

## ***Targeted Recruiting - Healthcare***

Applicants for healthcare positions are in high demand. And the jurisdictions that provide healthcare as their primary function have also expressed a need for Spanish-speaking applicants to reflect their changing patient population WDAS is in the initial stages of an aggressive strategy to meet these needs. This strategy includes the use of billboards placed near competing healthcare facilities, increased newspaper and internet advertising, increased awareness at nursing schools, and advertising in Puerto Rico. Very early indications show that efforts are having an impact with a month-over-month increase in applications for nursing positions.



The chart and table below shows a summary and totals for sources for applications, hires, and applicants placed on registers from November 1, 2005 through April 30, 2006.

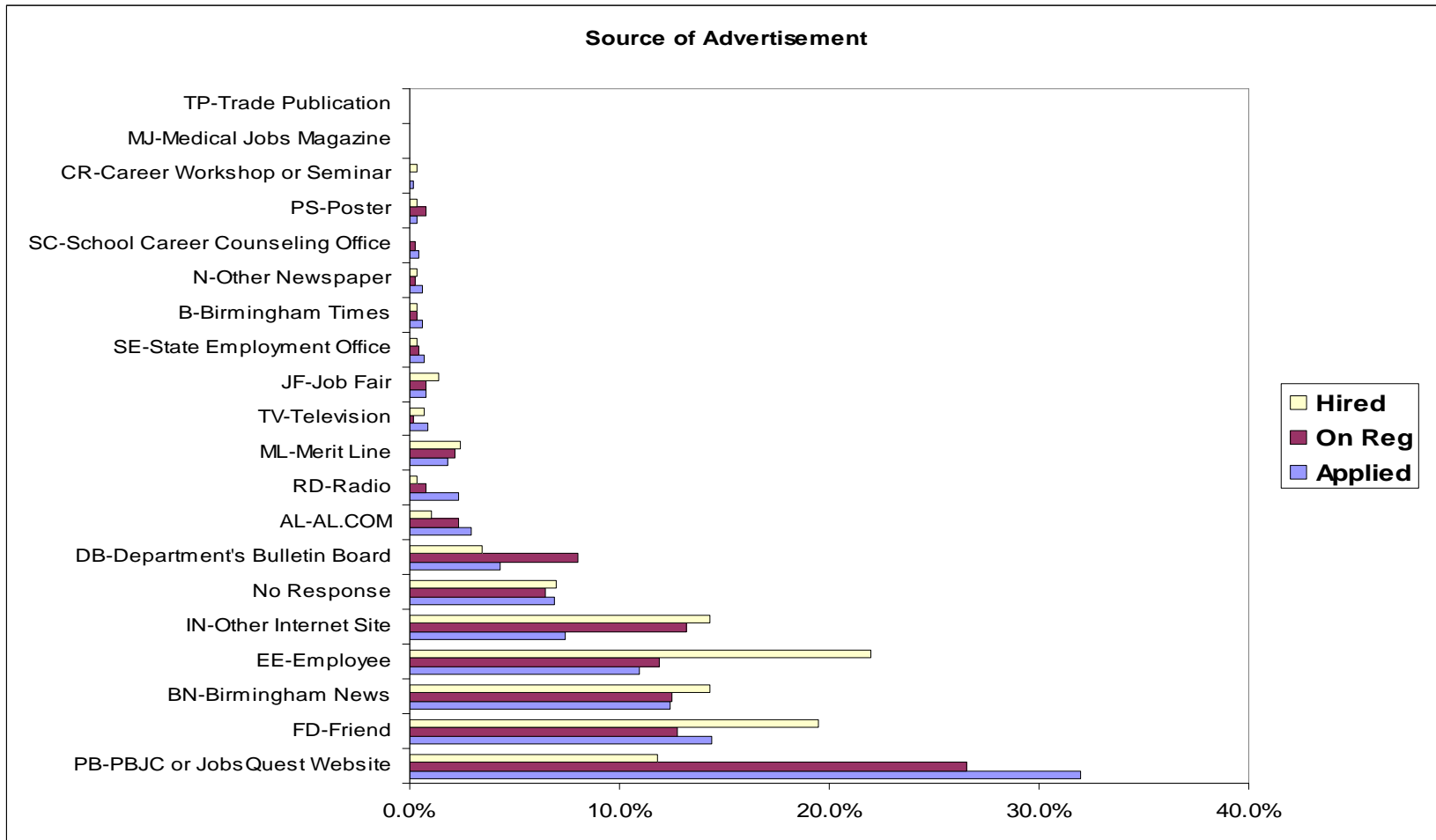


Table shows responses from applicants when asked: *How did you learn of this position?*

<u>Answer</u>	<u>Applied</u>		<u>On Reg</u>		<u>Hired</u>	
PB-PBJC or JobsQuest Website	1674	32%	651	27%	34	12%
FD-Friend	754	14%	313	13%	56	20%
BN-Birmingham News	652	12%	307	13%	41	14%
EE-Employee	575	11%	292	12%	63	22%
IN-Other Internet Site	386	7%	322	13%	41	14%
No Response	361	7%	159	7%	20	7%
DB-Department's Bulletin Board	227	4%	196	8%	10	4%
AL-AL.COM	155	3%	57	2%	3	1%
RD-Radio	122	2%	20	.8%	1	.3%
ML-Merit Line	94	2%	53	2%	7	2%
TV-Television	45	.9%	4	.2%	2	.7%
JF-Job Fair	41	.8%	18	.7%	4	1%
SE-State Employment Office	37	.7%	11	.4%	1	.3%
B-Birmingham Times	33	.6%	8	.3%	1	.3%
N-Other Newspaper	32	.6%	7	.3%	1	.3%
SC-School Career Counseling Office	21	.4%	6	.2%	0	0%
PS-Poster	16	.3%	20	.8%	1	.3%
CR-Career Workshop or Seminar	7	.1%	2	.1%	1	.3%
MJ-Medical Jobs Magazine	2	0%	3	.1%	0	0%
TP-Trade Publication	1	0%	0	0%	0	0%
	5235	100.0%	2449	100.0%	287	100.0%

### ***Going Forward***

During the next six months WDAS will continue to monitor employment trends, research most effective marketing methods, and monitor and evaluate the effectiveness of these efforts. Below is a listing of specific projects that will be accomplished through October 31, 2006.

- Evaluate Police Officer Deputy Sheriff recruiting efforts and develop framework for next recruiting campaign.
- Develop and implement strategy for Firefighter recruiting campaign.
- Complete implementation of recruiting strategy for Healthcare positions.
- Benchmark, monitor, and improve customer service levels.
- Implement comprehensive branding campaign for JobsQuest recruiting site.
- Build upon relationships with Hispanic organizations.
- Build upon relationships with career centers and department heads at colleges and universities to target individual programs specific to the jurisdictions' needs.

# 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, the extensive duties falling under this division, 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 job application acceptance on the PBJC online application system;
- reviewing applications submitted for Merit System job classes against established minimum qualifications for the positions;
- administering a variety of employee selection tests and candidate tutorial/orientation sessions;
- identifying and recruiting qualified, volunteer assessors to evaluate candidate performance on employee selection tests;
- conducting assessment centers designed to evaluate candidate perform on job-related selection procedures;
- entering data from employee selection tests, analyzing the psychometric properties of the test items, and calculating final scores for all candidates;
- notifying candidates for employment of their examination scores and evaluating candidate appeals;
- establishing an eligible register including all candidates who passed the selection procedures; and
- writing validation reports describing in detail all phases of the selection process outlined above.

## Staffing

The Performance Measurement Division currently consists of 30 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. A detailed description of the functions of these positions can be found in the 2005 Annual Report.

As mentioned in the PBJC 2005 Annual Report, the Performance Measurement Division was actively recruiting to fill a number of vacant positions within the division. The recruiting strategies outlined in the 2005 report were successful in filling most of these vacancies. Since the submission of the 2005 Annual Report, the Performance Measurement Division has hired four Assessment & Development Specialists and one Web Survey & Multimedia Developer. These new hires and an overview of their qualifications are presented below.

- Brett Cooksey – Assessment & Development Specialist

Brett obtained a Bachelor of Arts in Psychology from the University of South Alabama and a Master of Arts in Industrial-Organizational Psychology from Appalachian State University. His professional experience includes conducting job analyses and developing selection tests with the City of New Orleans Civil Service, as well as developing human resource and management training programs for Merchant's Distributors, Inc. and Lowe's Home Improvement.

- Geoff Burcaw – Assessment & Development Specialist

Geoff earned a Bachelor of Arts in Psychology from the University of California Santa Cruz and a Master of Arts in Industrial-Organizational Psychology from Colorado State University. Prior to coming to the PBJC, Geoff worked as a selection consultant for SHL USA where he conducted job analyses and developed employee selection tests. Geoff's professional experience also includes working as a job analyst for the Human Resources Research Organization.

- Lauren McMahan – Assessment & Development Specialist

Lauren obtained a Bachelor of Arts in Psychology from Troy State University and a Master of Science in Industrial-Organizational Psychology from the University of Tennessee at Chattanooga. Lauren has worked in personnel settings with the City of Dothan, Alabama and Memorial Healthcare Systems, where her experience included developing selection examinations, creating performance appraisals, and evaluating compensation data.

- Justin Wolfe – Assessment & Development Specialist

Justin attended the University of Nebraska-Lincoln where he earned a Bachelor of Arts in Psychology. He also earned a Master of Science in Industrial/Organizational Psychology from the University of Nebraska-Omaha. Prior to being hired as an Assessment & Development Specialist, Justin worked as an intern for the PBJC. Justin is fluent in Spanish and has related experience working as a Skills Analyst for SkillsNet Corporation and as a graduate teaching assistant.

- Dominga Gardener – Web Survey & Multimedia Developer

Dominga earned a Bachelor of Science in Computer Science with a minor in Software Engineering and Mathematics from Mississippi State University. She is currently working on a Masters degree in Information Systems Management. Dominga has experience in various computer and web development related positions with Eastman Chemical Company, Service Zone, Pruitt's Fabrication & Welding, and Mississippi State University. In her position within the PBJC, Dominga develops high-fidelity video simulations for employee selection tests, electronic data capturing systems (e.g., electronic job analysis questionnaires), management of departmental data, and computerized applications that increase the accuracy, effectiveness, and efficiency of the work performed within the division.

In addition to the permanent staff members presented above, the Performance Measurement Division has hired two interns since the submission of the 2005 Annual Report.

- Winette George – Intern

Winette is currently working to complete her Masters degree in Industrial-Organizational Psychology at the University of West Florida. Winette has completed her coursework and is anticipating receiving her degree in May of 2006 upon the completion of her internship and thesis requirements.

- Blair Cranford – Intern

Blair is also working to finish her Masters degree in Industrial-Organizational Psychology at the University of West Florida. Blair is anticipating receiving her degree in May of 2006 upon the completion of her internship requirements.

Since the submission of the 2005 Annual Report, the Performance Measurement Division has experienced turnover in two Assessment & Development positions. Charu Khanna resigned from the PBJC in April after accepting an offer to work with the Human Resources Research Organization in Alexandria, Virginia. Barry Jackson submitted his resignation from the PBJC effective in May after accepting an offer to transfer to Jefferson County to provide selection expertise to guide the development of their secondary selection procedures.

In addition to these departures, there are three vacancies in the Assessment & Development position remaining since the submission of the 2005 Report. The PBJC anticipates filling some of these positions from existing interns and the remaining positions externally. The Performance Measurement Division anticipates full staffing by June of 2006.

## 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. Additionally, the division is constantly striving to restore and repair the image of the PBJC not only within the government agencies and jurisdictions served, but also with regard to public perception both locally and nationally. The following sections will outline the major Performance Measurement Division goals set for 2006, the current progress toward achieving these goals, and the activities and accomplishments of the division over the past six months.

At the end of 2005, the Performance Measurement Division established strategic goals for the 2006 calendar year that would support its overall mission. The established goals are outlined below:

- Develop and administer selection procedures that identify the most qualified candidates for employment in the Merit System.
  - Develop and administer selection procedures in order to establish registers (lists of qualified candidates) for the 184 job classes that had vacant positions as of December, 2005
  - Develop and administer selection procedures in order to establish registers for Fire Promotional jobs (i.e., Fire Apparatus Operator, Fire Lieutenant, Fire Captain, Fire Battalion Chief II) and entry level public safety jobs (i.e., Police Officer, Firefighter).
- Develop a strategy for identifying future job vacancies in order to anticipate and more efficiently fill the employment needs of the jurisdictions.
  - Data that will be used to project and forecast upcoming vacancies will be identified, collected and analyzed.
  - Results of data analyses will be used to effectively schedule job analysis and test development activities for the following calendar year (i.e., 2007).
- Conduct professional development activities to ensure test development staff remains up to date on legal, professional, and scientific developments in the area of employee selection.
  - Conduct training program designed to teach new employees procedures governing all aspects of employee selection in PBJC Merit System.
  - Conduct monthly "lunch & learn" sessions that require reading newly published research in the area of employee selection and discussing the impact of the research on work performed by the PBJC.

- Conduct semi-annual workshops designed to enhance skills in employee selection.

## **Developing and Administering Selection Procedures**

As presented above, the primary goal of the Performance Measurement Division is to develop and administer selection procedures that identify the most qualified candidates for employment in the Merit System. This goal indicated a number of eligible registers that are projected to be established by the division in the 2006 calendar year and specifically addresses the release of registers for public safety positions.

### ***Public Safety Registers***

A significant point of emphasis for the Performance Measurement Division has been, and continues to be the development of selection procedures for public safety (i.e., police and fire) jobs. Staff members have worked diligently to strengthen the relationships between the PBJC and the police and fire departments residing in Jefferson County. Significant progress has been made in the first half of 2006 toward continuing to provide timely and effective service to these public safety departments. Since the submission of the 2005 Annual Report, the PBJC has established registers for the police promotional series jobs of Police/Sheriff's Sergeant, Police/Sheriff's Lieutenant, and Police/Sheriff's Captain. In addition to the police promotional series job classes, the PBJC is working diligently to establish a new register for the entry-level Police Officer/Deputy Sheriff job class. In an effort to identify a greater number of qualified candidates, the PBJC has extended its recruitment efforts beyond Jefferson County. Also designed to increase the number of qualified applicants that can be placed on the eligible register, the PBJC has decided to administer the Police Officer/Deputy Sheriff selection test on multiple dates and in multiple locations. To date, the PBJC has administered this selection test to 354 candidates on March 29<sup>th</sup> at the BJCC in Birmingham and 27 candidates on April 10<sup>th</sup> at the Parks & Recreation Facility in Tuscaloosa, Alabama. The PBJC has secured testing facilities in Miami, FL and Houston, TX (free of charge) for administrations of the Police Officer/Deputy Sheriff selection test on May 13<sup>th</sup>. A final test administration is scheduled for Saturday, May 20<sup>th</sup> at the BJCC in Birmingham. The PBJC anticipates establishing the new Police Officer/Deputy Sheriff register upon the expiration of the 2005 eligible register (i.e., July 28, 2006).

The PBJC has also worked diligently to establish a register for the fire promotional series jobs. To date, the PBJC has developed and administered two of three examination components of the Fire Apparatus Operator selection procedure. On April 11<sup>th</sup> and 12<sup>th</sup>, the Performance Measurement Division administered two video-based job simulations to 284 Fire Apparatus Operator job candidates at the PBJC's assessment center facility. Thirty-four fire officers at the rank of Lieutenant or higher were recruited from around the country to serve as assessors for the aforementioned video-based job simulations. The

assessment process was successfully conducted the week of April 17<sup>th</sup>. The 284 candidates who attended the Fire Apparatus Operator tests on April 11<sup>th</sup> and 12<sup>th</sup> have been invited to participate in a hands-on work sample test in which they will be required to operate the pumper on a fire apparatus. This examination component is scheduled for the week of May 15<sup>th</sup> at Legion Field in Birmingham, Alabama. The PBJC anticipates establishing a register for this job class in July of 2006.

The PBJC has also administered the selection procedure for the Fire Battalion Chief II job class. This procedure consisted of four examination components (i.e., a structured interview, a simulated staff meeting, a subordinate role-play meeting, and a written in-basket), all of which were administered to 34 candidates at the PBJC's assessment center facility on April 24<sup>th</sup>. Eight fire officers at the rank of Fire Battalion Chief or higher were recruited from around the country to serve as assessors for the Fire Battalion Chief II selection components. The assessment process was successfully conducted on April 25<sup>th</sup> through 28<sup>th</sup>. The eligible register is anticipated to be released in May of 2006. The Performance Measurement Division also continues to work to develop selection procedures in order to establish new registers for the Fire Captain and Fire Lieutenant job classes. The PBJC anticipates administering these selection procedures in October of 2006.

The PBJC also established a new register for the entry-level Firefighter job class in March, 2006. The selection procedure for this job class consisted of a written examination (administered in December, 2005) and a structured interview (administered in January, 2006). A total of 376 candidates passed the selection process and were placed on the eligible register.

As mentioned in the 2005 Annual Report, the Performance Measurement Division is working to ensure that with each additional test development process for the public safety positions information is gathered to improve future selection procedures and the service provided to the police and fire departments. The PBJC has committed to testing for entry level Police Officer/Deputy Sheriff and Firefighter on an annual basis and testing for the promotional series police and fire jobs every 18 months.

### ***Non-Public Safety Registers***

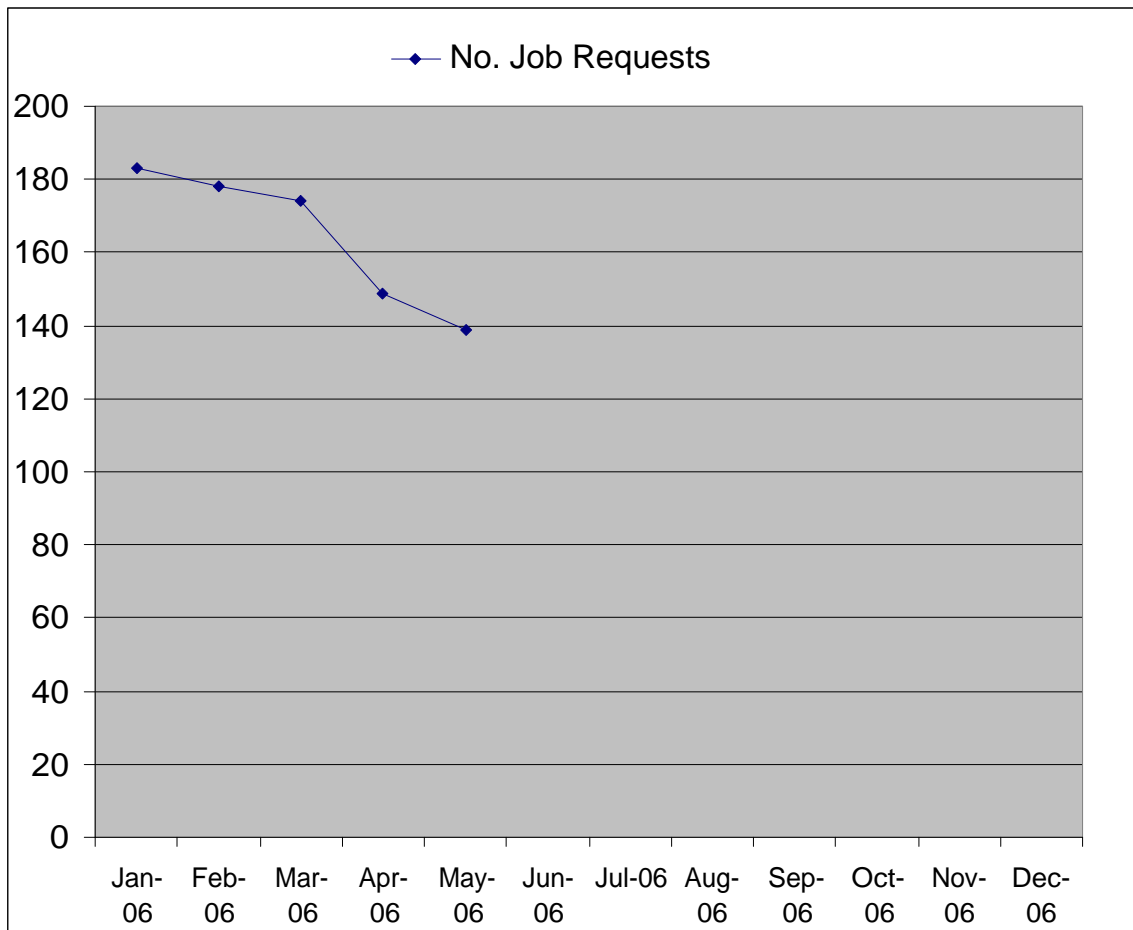
At the time of the 2005 Annual Report there were 184 jobs classes with active requests for certifications, but no active eligibility register in place (henceforth referred to as the "backlog"). As previously outlined, the Performance Measurement Division established as a goal for 2006 the release of 184 eligible registers. Significant progress has been made toward eliminating the backlog and achieving this goal. During the period between the 2005 Annual Report and April 30, 2006, the Performance Measurement Division has released 99 registers. Of these 99 registers, 76 were for jobs that were part of the backlog at the time of the 2005 Annual Report. During this period, 8 requests that were in the backlog were cancelled and an additional 39 requests for certification for



jobs without an eligible register were received. The result is a total of 139 jobs in the backlog as of April 30, 2006. This is a net decrease of 45 backlog jobs over this five-month period. Figure 1 presents the total number of jobs in the backlog by month from January 1 through May 1, 2006.

As can be seen by the data presented above, the PBJC is on pace to accomplish its goal of releasing 184 during 2006. Additionally, significant progress is being made in the elimination of the backlog. Continued efforts will be made to further reduce this number throughout 2006. Priority is given with regard to assignment of work to these jobs with current requests.

**Figure 1. Month-by-Month Progress on Job Classes in the Backlog**



### Vacancy Projection Data

As the backlog of jobs in need of an active register draws closer to being eliminated, the PBJC will be in a position to more quickly address the employment needs of the jurisdictions. In order to meet the jurisdictions' needs in the most efficient and effective manner, it is necessary for the PBJC to anticipate and project potential future employment needs. Therefore, a second

goal of the Performance Measurement Division for 2006 is to develop a strategy for identifying potential future job vacancies in order to anticipate and more efficiently fill the employment needs of the jurisdictions. By knowing which jobs will likely have openings in the near future, the PBJC can focus efforts to ensure that registers can be established prior to, or very soon after a request for certification has been submitted.

In order to accomplish this goal, the Performance Measurement Division has reorganized the distribution of work to the job analysis and test development teams. Each team within the division has been assigned specific job families for which they are responsible for conducting job analysis, developing selection procedures, and establishing eligible registers. Each team has started collecting data for each of the jobs within its job families. The initial data will be compiled into a database for use in creating reports and monitoring data collection. Initial data being collected from the Personnel Board's human resource management system include: number of employees within each job class, number of requests received in past years for each job class, and tenure/age of current employees within each job class. Additional data collection is being discussed to identify other data needs. Collection of additional data may require input from, and the cooperation of the jurisdictions within the PBJC Merit System.

## **Staff Development**

As mentioned in the 2005 Annual Report, the professional development of employees is of utmost importance. 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. Therefore, the third goal of the Performance Measurement Division is to conduct relevant and effective professional development activities. A number of activities have been performed in the first half of 2006 and many more activities are anticipated during the second half of the year.

In January and February of 2006, the Performance Measurement Division reviewed and updated the Performance Measurement Procedure Manual. In addition to updating the procedures, a mandatory division-wide training program was developed and administered in multiple sessions spanning from February to April. The training was geared toward ensuring that new staff members gained a thorough understanding of the procedures governing all activities performed within the division, existing staff stayed up to date on procedures, and expertise and information was shared among members of the division. The training program spanned eight sessions, totaling approximately 40 hours of presentation, instruction, and group exercises. The following presents an overview of the topics covered:

- *Training Introduction* – This section of the training provided an introduction to the PBJC and an overview of the training program. Information shared

included an overview of the PBJC's history, purpose, and structure, as well as the responsibilities and services offered by each of its divisions.

- *Job Analysis* – The job analysis training presented a detail review of the procedures used when conducting a job analysis for jobs within the PBJC Merit System. Exercises were administered to help ensure the intended knowledge was obtained and could be easily transferred to the work. Discussion was held regarding common obstacles/pitfalls in the job analysis process, so that staff can anticipate and avoid these issues and to ensure that important decisions are made appropriately.
- *Test Development* – The test development training covered a variety of test development related issues, including test security, pros/cons of commonly used selection procedures, requirements of the *Uniform Guidelines* involving test validation, how to determine the most appropriate test(s) to use in a given situation, and general test development concerns. Training also provided exercises designed to provide practice and expertise in the procedures for developing commonly used selection tests.
- *Creating Announcements & Screening Applications* – This section of the training provided a step-by-step process for creating and posting an electronic announcement, as well as for screening electronic applications using PeopleAdmin (i.e., PBJC's on-line application system). Substantial discussion was provided regarding how to avoid potential issues with the PBJC online application system and how to establish appropriate criteria for screening applications.
- *Test Assessment* – This portion of the training outlined the major activities associated with planning, preparing for, and conducting an assessment of candidate performance following a test administration. It focused on steps such as identifying appropriate assessors and conducting assessor training.
- *Data Management* – The data management training included reviewing the procedures for ensuring the integrity of all data. Specific instructions were provided for entering, cleaning, and verifying data, as well as creating and saving data files, and using SPSS syntax files.
- *Analyzing and Scoring Test Data* – This portion of the training expanded on the data management processes by covering a variety of procedures used to analyze and score test data. Specific procedures for conducting statistical analyses, weighting test components, and establishing cut score were provided. Also, several procedures for calculating and analyzing adverse impact were presented and discussed.

In addition to the training mentioned above, the Performance Measurement Division is in the process of establishing monthly "Lunch & Learn" presentations/discussions to ensure that staff stays up to date on developments in the field of employee selection and industrial/organizational psychology. The first Lunch & Learn was originally scheduled for April; however, due to the extensive training schedule and test administration schedule that the division experienced in April, the first Lunch & Learn has been pushed back until May of 2006. The activities that will be involved in the Lunch & Learn 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.

In order to further ensure that Performance Measurement staff stays abreast of developments in the field of employee selection and industrial psychology, two professional workshops are planned for 2006. The workshops will cover topics that relate to the work performed in the division and that are too detailed or complex to be presented in a Lunch & Learn. The PBJC anticipates external experts in the field of industrial/organizational psychology conducting the workshops. Specific topics areas and potential facilitators are being discussed. The Performance Measurement Division anticipates the first of the workshops to be delivered in the summer of 2006.

In addition to formal training programs and workshops, the Performance Measurement Division is encouraging professional development at the individual level. The Performance Measurement Division believes that improving the perceptions of the PBJC in the eyes of the general public and the employee testing community is of great importance. Visibility and participation of PBJC staff at professional and educational functions provide positive publicity that goes a long way in erasing the troubled history that has been associated with the Consent Decree and the PBJC. As such, staff members are encouraged to conduct research, attend conferences, and participate in other activities designed to improve individual knowledge and skill in the area of employee selection and designed to positively promote the PBJC. Staff members from the Performance Measurement Division have been active in submitting employee selection related research papers and conducting lectures under the PBJC name at educational institutions, professional conferences, and training seminars. During 2006, the Performance Measurement staff members have been involved in the following research and teaching/training related activities:

- Elizabeth Bourgeois, Jeffrey Crenshaw, Divya Keshavan, Stacey Lange, Ph.D., Bronze McGhee, Lauren McMahan, and Thomas Carnahan presented a two-day training workshop presented at the Alabama Association of Public Personnel Administrators in Montgomery, Alabama on April 10<sup>th</sup> and 11<sup>th</sup>. The title of the training was *Recruitment, Selection and Retention* and covered the following topics:
  - Human Resource Planning & Job Analysis (Thomas Carnahan)
  - Recruitment Planning & Initiatives (Stacey Lange, Ph.D.)
  - Issues & Laws Affecting Employee Selection (Elizabeth Bourgeois)
  - Types of Selection Measures (Divya Keshavan & Lauren McMahan)
  - Evaluating & Scoring Your Selection Procedures (Jeffrey Crenshaw)
  - Employee Retention (Bronze McGhee)
  
- Stacey Lange, Ph.D. submitted a paper to the 2006 International Public Management Association for HR Assessment Council (IPMAAC) Conference

titled *Adopting Content Valid Minimum Qualifications Reduces Adverse Impact, but Decreases Applicant Test Performance*. The submission was accepted and will be presented at the IPMAAC Conference in Las Vegas, Nevada on Monday, June 26, 2006.

- Marty Alber, Ph.D., Brian Bellenger, Ph.D., Jamie Koladish, and Libby Miller submitted a paper and presentation to the 2006 IPMAAC Conference titled *Life Under Consent Decree: Testing and Technological Innovations*. The submission was accepted and will be presented at the IPMAAC Conference in Las Vegas, Nevada on Wednesday, June 28, 2006.

Finally, in addition to the aforementioned activities, the Performance Measurement Division plans to send representatives from the staff to professional conferences to gain knowledge and gather information to share with the division after returning from the conference. Several members of the division are scheduled to attend the 2006 Society of Industrial & Organizational Psychology (SIOP) Conference in Dallas, Texas on May 4<sup>th</sup> through 7<sup>th</sup>. Conference attendees will be required to attend sessions related to the work at the PBJC and, upon return, make presentations summarizing the sessions and distributing materials gathered from the conference. Additionally, the PBJC is planning to attend the 2006 IPMAAC Conference held in June of 2006. Attendance at these conferences not only provides professional development opportunities, but also provides positive exposure nationally for the PBJC.

## **Conclusion**

Overall, the Performance Measurement Division has made significant strides toward achieving all goals presented for 2006. 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 is also making efforts to improve the communication and collaboration among departments within the PBJC. This includes working with the Workforce Analysis Department to share information gathered about various job classes, and provide guidance and assistance across departments to ensure that the PBJC Merit System has a functional and effective job classification system. The goal of this collaboration is to ensure that data gathered and potential issues uncovered during the job analysis phase of the selection procedure development can be shared with Workforce Analysis in order to assist them in ensuring the appropriate classification of positions. In addition to increased collaboration with Workforce Analysis, the Performance Measurement Division is working to create better communication with the Workforce Development & Application Services Division to ensure that better and timelier information can be provided regarding details of job requirements and the jurisdictions' recruitment needs. Greater collaboration will ensure that the qualifications of the individuals applying for Merit System job positions will better meet the needs and expectations of jurisdictions and lead to a better and more productive workforce for the Merit System as a whole. 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 all about learning. Our 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. We believe that increased competency 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. Affiliation with other community organizations broadens the Department’s problem solving base and leads to better solutions. With this affiliation, Training can access the wealth of human and physical resources available in Jefferson County and use them in employee training. Training and Career Development is staffed with six FTEs - four Training Advisors, one Training & Career Development Assistant and a Team Leader.

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.

### **Activities and Accomplishments**

Following are highlights and accomplishments for the last six months, beginning November 30, 2005, ending April 30, 2006.

#### ***Account Management, Assessment, and Improved Scheduling***

The Department implemented a Training Account Manager strategy to ensure that jurisdiction Appointing Authorities and their department managers are aware of the Training Department and to encourage use of Training’s services. Training staff act as Account Managers and treat assigned jurisdictions as their customers. For the City of Birmingham and Jefferson County Health

Department, contact is coordinated through the Training Departments in those jurisdictions.

Trainers begin with Appointing Authorities and then visit department managers, get acquainted with personnel and operations, assess needs with managers, and schedule courses or other training as requested. Since January, Training has made onsite visits to 18 jurisdictions and 68 departments. Included were the Jefferson County Sheriff's Department and the Birmingham Police Training Academy. Training scheduled 16 courses at jurisdiction sites as a result of this needs assessment. Also, Trainers' visits affirmed the need for the PBJC to pursue a means to provide training in occupational Spanish for frontline and public safety employees.

Jurisdiction managers benefit directly from this work plan in the following ways:

- They have their "own" point person to call and, as a result, Training has been able to build and strengthen productive relationships with jurisdictions. Managers can share their current training needs and priorities, based on the latest developments in their jurisdictions. This results in real, up-to-date planning data for developing training.
- Before Training implemented the account management plan, jurisdiction managers received announcements of courses monthly, allowing them to plan only one month in advance. With site visits, trainers realized the need for long-term planning data and the Department now offers a series of calendars: annual, quarterly and monthly, online and hard-copy when needed. Now managers can schedule employees three months in advance for computer courses and twelve months ahead for management/supervisory and professional development. Trainers also provide managers information during their site visits on registering online, 24 hours a day, on any shift.
- They receive an orientation to Training services when Trainers make site visits. One service is the use of PBJC training space, including classroom space and the computer lab. The Sheriff's Department has saved rental fees for computer and classroom facilities for two separate week-long courses for trainees from across the US.

### ***Completion of Core Curriculum Training Development***

Over the last six months, Training completed development of the courses, both classroom and computer-based, and assessments shown in the table below.



## Course Development November 30, 2005 – April 30, 2006

Supervisory Skills	Professional Development	Computer
Employee Discipline: Legal Landmines	Emergency Preparedness	Publisher
Training and Developing the Work Team	Time Management	MS Access Intermediate Pre-Assessment
	Stress Management - modified	MS PowerPoint Advanced Pre-Assessment
	Structured Interviewing	ImageNow (PBJC)
	Excelling at the Front Desk - modified	Lawson Training for Health Department - Update
	System Security Computer Based Training (CBT)	Lawson Training for PBJC Classification and Compensation
	New Employee Orientation CBT	

With the addition of Time Management, Training and Developing the Work Team, and Employee Discipline, we have now completed all management, supervisory and professional development training identified in a 2003 needs assessment. In September, 2006 Training plans to offer managers an option of obtaining a Certificate of Merit System Supervision based on managers' completing all prescribed core courses and three elective courses. Classes proposed for inclusion in the certificate curriculum are listed below:

### Core Courses

The Supervisor's Job  
 Leading the Work Team  
 Employee Discipline: Legal Landmines  
 Motivation in the Workplace  
 Coaching  
 Delegating  
 Training and Developing the Work Team  
 Giving and Receiving Feedback  
 Workplace Harassment

### Elective Courses (select three)

Effective Performance Appraisals  
 Structured Interviews  
 Building a Team that Works  
 Effective Meetings  
 Managing Change  
 Listening for Understanding  
 Stress Management  
 Entry Level Computer Skills  
 Word Basic  
 Excel Basic  
 Access Basic  
 PowerPoint Basic

With the inclusion of Microsoft Publisher, all employees now have access to courses in a wide range of Microsoft Office Suite software. Course pre-assessments for Access Intermediate and PowerPoint Advanced allow employees to easily and accurately determine if they will benefit from taking a

higher-level course. Other development included Emergency Preparedness, Structured Interviewing, and ImageNow software courses for PBJC staff.

These new courses increase employee access to professional development. They are available at no cost to Merit System employees and are comparable to courses offered by national and local vendors at a cost of at least \$99 per person.

### ***Annual Training Initiative: Law Enforcement Leadership Conference***

On November 2, 2006, Merit System law enforcement leaders will have the opportunity to attend a PBJC Training conference, *Law Enforcement Leaders: Serving and Protecting Our Diverse Community*. It is the first annual PBJC training conference. Topics and agendas for this and subsequent annual conferences should address complex issues that require a shared understanding and collaboration by diverse constituents to arrive at potential solutions.

This conference addresses a need that results from significant changes in Jefferson County's ethnic populations over the past ten years, with increasing numbers of Hispanics, Asians and Indians. Law enforcement leaders need to understand how increasing cultural diversity affects their organizational effectiveness. Law enforcement employees, by virtue of being highly visible in communities, particularly need to understand and learn to effectively communicate with and secure the cooperation of people from different cultures.

In addition to its primary focus, this first annual PBJC training conference serves multiple purposes. It will distinguish PBJC Training from other Merit System training organizations in its ability to cut across jurisdiction lines and address training issues that affect Jefferson County. It broadens Training's partner base by convening a planning committee of representatives vested in the topic. And, most important, it will provide valuable information about a key issue for one of the largest groups of employees in the Merit System.

This conference will accommodate approximately 200 ranking law enforcement officers. It will include a keynote speaker, Charlotte-Mecklenburg Police Chief Darrel Stephens, who will address how his department's strategy has worked to build a strong relationship with a diverse community. Concurrent sessions around this keynote address will include a past, present and future demographic description of Jefferson County; a history of immigration and a discussion of economic implications; an assessment by attending officers of their own views about diversity; a model of community policing; and strategies for building effective law enforcement-community relationships. Following these sessions, representatives from five different Jefferson County ethnic groups will participate in a closing discussion of resources available to law enforcement for better understanding and working with diverse groups of people.

A planning committee was convened and met regularly during the last six months to develop an agenda, identify and secure a keynote speaker, and plan concurrent sessions. Other activities completed during this period include contracting with The Harbert Center for a conference site, food and parking, completing a preliminary budget, and drafting a publicity brochure.

Working with Training on this project are representatives of the City of Birmingham Police, Jefferson County Sheriff's Department, City of Hoover Police, Hispanic Interest Coalition of Alabama, KPI Latino, the University of Alabama Center for Urban Affairs, the National Conference of Community and Justice, and the Birmingham Chamber of Commerce, and the PBJC Workforce Development and Applicant Services Department.

### ***Grant Funding for PBJC Training for Female Public Safety Applicants***

PBJC is exploring the potential of instituting a program to increase the number of females applying for, qualifying for and working in public safety positions. The program will focus on using training as a means for removing obstacles that deter females from pursuing public safety careers. During this fiscal year, Training, Administration, and Workforce Development staff began searching for avenues to fund a preparatory course for females interested in public safety. The three-day program would provide them extensive orientation on preparing for qualifying physical agility tests, on study skills for taking written tests and on social aspects of Academy life. Components proposed for the program include current employee referrals and both male and female mentors. The PBJC group has developed a preliminary Request for Proposal (RFP) to submit to agencies identified in the funding source search. They will meet with Merit System public safety training staff to refine information and further develop the RFP.

### ***Identifying Job Competencies as Foundation for Training***

Employees who aspire to supervisory levels, current supervisors and managers will be able to earn a Merit System Supervision Certificate. To date, Training has developed a list of all the courses required to earn a certificate and will develop operational guidelines for publication to employees by September 2006.

Training also organized a group of employees to establish a set of core competencies needed by all PBJC employees such as customer service and Microsoft Office Suite.

### ***Other activities and accomplishments included:***

- Providing ongoing training that included 80 course offerings of management, supervisory, professional development and computer instruction to 1003 employees representing 10 jurisdictions.
- Providing Lawson training to Classification and Compensation and the Health Department.
- Conducting training sessions internally for PBJC staff on new ImageNow software and on new Emergency Preparedness policies.
- Conducting a needs assessment based on Jefferson County departments to ascertain need for Project Management in response to a request.
- Continuous interaction with jurisdiction employees on how to use the online registration system.
- Providing Structured Interviewing Training to prepare all Board employees to participate on hiring panels and to assist in consistently implementing policies.
- Investigating resources to provide occupational Spanish courses for public safety employees. Training's goal is to provide several options for employees:
  - occupational Spanish for learning a set of basic job-specific statements and questions for essential communication;
  - conversational Spanish provided through a language lab setting;
  - tapes and CDs for practice outside courses;
  - opportunities to practice with persons whose first language is Spanish; and
  - critical incident training using videotaped scenarios.

### **Future Plans**

Plans include:

- Increasing the development of computer based training; i.e., orientation to the Merit System for new employees; effective meetings, and other instructor-led courses suitable for CBT format.
- Developing a technology initiative to ensure that all jurisdiction employees have access to computer training.
- Working with PBJC departments to develop consistency in style for procedures manuals, documents and other written communication.
- Collaborating with other training departments (Birmingham, Jefferson County and Health Department) to align content for career paths or certificate programs so that employees may receive recognition for courses taken at PBJC or in their jurisdiction.
- Strengthening Training's infrastructure, analyzing strengths and weaknesses, and completing procedures manual.

- Expanding the PBJC new employee orientation into an “Orientation to the Merit System” for new employees in all jurisdictions.
- Continuing the Law Enforcement Leaders conference planning, securing sponsorships to offset costs, developing detailed timeline, writing publicity pieces and other related tasks.
- Confirming the resources and instruction plans for occupational Spanish.

## **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, 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 is equitable internally.

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 Section 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 staffed with 3 FTEs – two Compensation Advisors and a Manager.

### **Activities and Accomplishments**

The principal activity of the Workforce Analysis Department during the Report period was the conduct of the 2005-2006 Annual Classification Survey. This Survey represented a new approach to the *Enabling Act's* mandate to review all positions in the Merit System at least once every five years. Historically, this has been accomplished at a single point in time. The new approach is to review approximately 20% of the position population each year. The advantage to this approach is that positions can be analyzed in greater detail and respective supervisors and managers have more opportunity for dialog with the Board about job analysis findings.

During the conduct of the Survey which began July 1, 2005 and ends May 27, 2006, Position Description Questionnaires for one thousand fifty (1,050) positions were reviewed. Three Hundred Ninety Three individuals were interviewed onsite by the Workforce Analysis staff. This resulted in thirty six (36) recommendations for reclassification. Seventy eight (78) appeals were subsequently filed, sixty four (64) of which were on matters appealable to the Board. As of this writing, the appeals were being reviewed and final classification determinations made. These final determinations will be communicated by way

of the Board's Interactive Voice Response System (IVR) on Monday, May 1, 2006. A public hearing is scheduled for May 17, 2006. This hearing will conclude the 2005-2006 Survey process. Planning is underway for the 2006-2007 Survey which will kick-off July 1.

The online Position Description Questionnaire (PDQ) that was developed specifically for use during the Classification Survey worked as designed. Several enhancements were made to the product to allow for better tracking and reporting. Otherwise, few problems were reported by users. In addition to the PDQ, an online classification appeal form was created. The Appeals Form follows the same workflow path as the PDQ, allowing supervisors and managers to comment on employee appeals before they are reviewed by the Board. Both the PDQ and the Appeals Form, as well as all other Survey-related information and instructions, are accessed through the Boards main web site at [www.pbjcal.org](http://www.pbjcal.org).

An online salary survey of selected government jobs was developed and conducted to collect data on twenty-eight (28) jobs included in the 2005-2006 Annual Survey not typically available through published salary surveys. Twenty eight (28) municipalities and counties from around the country responded. The data was used to compare Merit System pay practices. Data from the Board's library of published salary surveys was also collected and compared to Merit System data. This resulted in grade adjustments to several classifications in the IT and Electronics job families.

In addition to the Survey-related activities reported above, for the report period, the Department staff created 8 new classifications, approved 72 new position requests, reclassified 0 positions, and reviewed and approved 42 advanced step requests.

## **Future Plans**

- Completion of the 2005-2006 Annual Classification Survey, planning for the 2006-2007 Annual Classification Survey and activities associated with its implementation will be a major focus of the Workforce Analysis staff during the coming months.
- The Board utilizes a point-factor compensation methodology for assessing internal equity. Point-factor plans need recalibration periodically. The Workforce Analysis staff will be initiating a process to accomplish this during the next twelve months.

## 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, 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 three (3) FTEs – An Employee Relations Advisor, Employee Relations Assistant, and a Team Lead.

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 2005 through April 2006, Employee Relations received notification of 263 employee actions (grievances, disciplinary appeals, etc.). In 196 of these actions, Employee Relations determined that the occurrences were non-appealable under PBJC Rules and Regulations. The remaining 67 actions were deemed appealable. However, actual appeals were filed in only 38 actions (see table below).

	<b>Non-Appealables</b>	<b>Appealables</b>	<b>Actual Appeals</b>
<b>Suspensions</b>	123	24	5
<b>Dismissals</b>	13	22	13
<b>Demotions</b>	-	1	1
<b>Grievances</b>	4	14	13
<b>Paid Injury Leave (IWP)</b>	-	6	6
<b>Other</b>	56	-	-
<b>Total</b>	<b>196</b>	<b>67</b>	<b>38</b>



## **Future Plans**

While historically, Employee Relations functioned to handle existing complaints, grievances and appeals, the department will increasingly move in the direction of becoming more proactive in problem prevention and conflict resolution.

Employee Relations' goal for the remainder of calendar year 2006 is outlined below:

- Work with Database Management to further develop the types of categories of recurring complaints that can be utilized on the tracking system.
- Will utilize tracking system to gather and analyze data on employee relations issues within the Merit system. This should provide appropriate information for feedback to and dialogue with Appointing Authorities as well as to guide a more proactive process for Employee Relations.
- Develop and collaborate with the Training Department to implement proactive training initiatives to address recurring complaints from Appointing Authorities.

## **RECORDS MANAGEMENT**

### **Overview**

Records Management is the central operations unit and point of contact for processing all personnel actions. This Department processes hire and re-hire actions for regular, provisional, temporary, and other limited appointments, merit increases, leaves of absence, promotions, demotions, transfers, terminations, and all other employee-related personnel transactions. In addition, the Department is responsible for the process of creating and issuing certification lists.

The Department is responsible for assuring that all personnel actions are consistent with the Rules and Regulations, as well as with PBJC operating policy and procedure. Records Management 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.

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. The Department has eight (8) FTEs – four Records Management Specialists, three Certification and Examination Assistants, and a Team Lead.

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
- Register Reinstatements
- Production of Salary Schedules

### **Activities and Accomplishments**

The Board's integrated electronic HR system has now been operational for sixteen months. Post-implementation challenges have been successfully addressed by the Records Management staff and the system is operating as designed. The staff members have proven themselves capable of researching and resolving most of the functional issues with little intervention from external

consultants and continue to demonstrate an impressive understanding of the system's functionality. 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.

Since November 1, 2005, the Department has processed:

- Seven hundred seventy eight (778) Requests for Certification for one thousand three hundred sixty seven (1,367) positions.
- Eight hundred (800) certification lists. The average time between receipt of a request in Records Management and issuance of the list was 1.67 business days.
- Two thousand six hundred eighteen (2,618) personnel actions.

### **Future Plans**

- Payroll Certification remains as the most significant goal for Records Management. Payroll Certification is a process whereby the payrolls of jurisdictions are programmatically compared to Lawson values and exception reports automatically generated. A payroll is certified when the exceptions are cleared. Payroll Certification is required by the *Enabling Act* of the State of Alabama to assure that jurisdictions are not paying merit system employees more than the Board has authorized. 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.
- Cross training also remains an important goal. The intent is for all Records Management staff to move from specialist roles and to function as generalists.
- 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.
- An ongoing goal of the Department is to improve the efficiency of its processing procedures, including reducing the average turnaround period for processing requests for certification lists to one day.

## **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 jurisdictions using the Board's online information systems. 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 Planning

The System Support unit has four (4) FTEs – A Network Administrator (IT Manager), Systems Administrator (Interface Manager), PC/Network Technician, and a Business Systems Analyst. The Business Systems Analyst had previously been shared with Data Management, but has been moved to System Support full-time. This position is principally responsible for system documentation, versioning control, interface integrity, and for serving as back-up to the System Administrator. The System Support unit supports eighty (80) users, two training labs, and five integrated IT systems. These systems are:

#### **Lawson**

Lawson is the Board's automated employee records management system. This web-based 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-based applicant management system. The system provides the capability for applicants to create online applications and to

apply to open jobs. It 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.

## **Aspen**

The Aspen System is the Board's learning management system. This online application allows Merit System employees to identify course offerings, preview training course content, register for courses, and evaluate training received. It also allows supervisors the ability to establish employee-specific training curricula for their staffs. In addition, Aspen provides online course delivery through computer-based training modules.

## **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 1.7 million paper documents to date.

## **Data Management**

The Data Management unit is responsible for supporting the reporting and analysis needs of PBJC departments. 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 is a critical support function. 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 monitor and improve operations. Currently, the unit maintains a library of forty-nine standard production reports in addition to responding to frequent one-off requests for data

from both inside and outside the Board. The Data Management staff also assists other Board departments 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 – Three Data Management Specialists and a Data Analyst. A new Data Management Specialist, Donna Cockrell, joined the Data Management staff in January.

A change to the organizational structure was made during February. The staff of the Data Management Department which had previously reported directly to the Manager of HR Information and Technology Services now reports directly to the Board's Network/Systems Administrator II, Roosevelt Butler. Mr. Butler serves as the first-line manager of the IT unit. The reorganization provides for more efficient and seamless delivery of functional and technical services to the Board's departments and operating units.

## **Activities and Accomplishments**

Systems Support and Data Management have had a very productive six months since publication of the Annual Report for 2004-2005 and the units continue to add value by identifying technological efficiencies to Board operating processes.

One of the most value-added additions to the Board's technology is the Interactive Voice Response System. For the period November 1, 2005, through April 25, 2006, the system received 6,928 calls. The IVR provides file information telephonically twenty-four hours a day, seven days a week that would otherwise be handled by staff. It was successfully used to provide participants in the Annual Classification Survey with classification determinations, a process that has previously taken a significant expenditure of time and labor in previous Classification Surveys.

During the report period, a new employment site was developed and brought online. Previously, the employment application was accessed through the Board's main web page. The new site, [www.jobsquest.org](http://www.jobsquest.org), is a dedicated site designed to better market the Merit System as an employer of choice. It has well developed search functionality and a job alert feature that allows interested individuals to be electronically notified when jobs become available in the Merit System in which they might be interested. The main web site, [www.pbjcal.org](http://www.pbjcal.org), remains as the Personnel Board's corporate site for communication of business related information to the public.

In addition, the Board's intranet site has been further developed and 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.

The IT Department configured the Board's imaging software to accommodate the imaging of business documents. The Board continues to move to a paperless organization wherever practicable. During the last report period, 1.7 million documents that existed in file cabinets had been imaged, the majority of which were hard copy personnel files and other historical documents. The Board is now imaging all business correspondence. This additional capability will allow current and future Board staff to quickly locate and retrieve correspondence, studies, reports, invoices, purchase orders, legal directives, and other financial and business related documents regardless of where in the Board the documents originated.

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). The Help Desk averages 186 calls and emails per month. Activity typically fluctuates with the number of jobs being advertised and spikes in the days just preceding the closing of large applicant population jobs. The Data Management staff researches issues and provides information directly to callers or coordinates and facilitates the resolution of user-related issues.

With the Board's successful transition to a virtually paperless environment and its dependence on its technological systems has come the need to put in place a comprehensive disaster recovery plan. The IT Department has completed a draft plan and is working with the City of Birmingham which will serve as the host site. This will allow the Board to recover almost full IT operations within hours of the Board's systems becoming unavailable or inaccessible due to fire, water, terrorism or other unforeseen or unavoidable occurrence. The disaster recovery host site will also serve as an off-site storage facility for file backups and will augment the Board's current data backup procedures.

Introducing software that allows PBJC employees to work remotely was a key objective of the IT staff during this fiscal year. Working remotely includes the capability to check emails and to access the Board's systems from any location having internet access through Virtual Private Network (VPN) technology. This objective was accomplished during the report period.

Commitment to technology mandates a commitment to continuous learning. Training is a critical success factor in the delivery of high-end services. The System Support and Data Management staffs attend training to stay abreast of the latest advances or changes in the systems they support or software they

utilize to accomplish their jobs. To this end, the staff has attended, or is scheduled to attend in the next six months, training in Unix, PHP Programming, Dell Open Management, Active Directory, and Veritas Backup Exec. Maintaining a high level of knowledge and skill in the use of this technology helps assure that the staff can continue to provide a high level of value added support to the Board's departments.

As a means of improving service delivery to member jurisdictions, a designated staff member from Data Management has begun working as a field representative providing on-site assistance to member jurisdictions helping their payroll coordinators resolve issues and problems with their online processing of personnel actions. This staff member is responsible for monitoring the flow of personnel actions from the jurisdictions to the Board, training jurisdiction payroll coordinators in the use of the Lawson product, and researching and resolving processing issues.

## **Future Plans**

- The Department is in the process of developing a register purge script 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. Purging registers currently is a time and paper-intensive process. The obvious advantage to using the IVR is that it minimizes staff involvement and improves the efficiency of the referral (certification) process by eliminating individuals from consideration who are no longer interested in employment.
- Finalization and implementation of the Board's Disaster Recovery Plan is a major objective for the IT staff in the coming months.
- With the increasing number of standard and ad hoc reports being generated by Data Management, a major goal is to create a comprehensive reports library that will serve as a searchable repository for reports and their respective functional and technical specifications. This will help avoid duplication of effort in the creation of reports and provide documentation for future reference.
- 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.