

The Merit System



2008 Semi-Annual Report

The Personnel Board of Jefferson County

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Report Period
November 1, 2007 – April 30, 2008

OVERVIEW

History of the Personnel Board of Jefferson County

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

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

Citizens Supervisory Commission (CSC)

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

CITIZENS SUPERVISORY COMMISSION
November 2007

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

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

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

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

Three-Member Board

The PBJC is governed by a Three-Member Board. Board members are appointed by the CSC and serve staggered six-year terms. The current PBJC Board Members (as of October 31, 2007) are as follows:

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

Continuing Role of the Monitor

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

The court further specified in part that:

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

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

Three-Member Board Appeals

The Three-Member Board has continued to actively review employee disciplinary appeals arising from decisions of hearing officers and other employee-related matters subject to a Board hearing. Since the November 2006 CSC meeting, the Three-Member Board has decided 22 disciplinary cases, 0 grievances, 5 paid injury leave appeals, and 0 citizen's complains.

Personnel Board of Jefferson County Services

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

- **Facilitating the hiring of qualified individuals to fill vacancies within the jurisdictions.** The responsibility of the Personnel Board is to manage job requisitions, recruit, accept and screen applicants, test qualified applicants, and send names of qualified applicants who pass job related, legally defensible tests to the employers within the Merit System.

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

Rules and Regulations

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

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

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

The Board has initiated a process to review the Rules and Regulations, which were last published in April 2005, for possible revision. In so doing, the Board is interested in gathering input from a broad constituency. As of this report date, appointing authorities, Merit System employees, and the general public have been invited to provide their comments and suggestions for modifications. Input was sought through the Board's website, through emails to department heads throughout the Merit System, and through the Board's Merit Matters newsletter. The formal comment period ended January 11, 2008.

PBJC's Service Functions

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

Workforce Development and Applicant Services encourages applicants for employment to consider careers in civil service and 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. In addition, Workforce Development is responsible for processing Requests for Certification for all types of appointments, providing certification lists to hiring jurisdictions, and certifying payrolls.

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

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

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

externally competitive with regard to relevant labor markets and equitable internally.

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

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

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

Staffing

Employees Hired Since November 1, 2007 – April 28, 2008

Andrea Salazar Intern

Employees Promoted Since November 1, 2007 – April 28, 2008

Andrienne Wormley Examination and Certification Assistant
Becky Lopez Examination and Certification Assistant

Employees Separated from the Board since November 1, 2007 – April 28, 2008

Randall Fields Employee Relations Team Leader
Connie Warren Administrative Assistant I
Divya Keshavan Assessment and Development Specialist
Lisa Tarvin Assessment and Development Specialist
Blair Davis Assessment and Development Specialist
Mary Stowe Rigrish Assessment and Development Specialist

ADMINISTRATION

Overview

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

Administration is responsible for:

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

Activities and Accomplishments

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

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

The Greater Birmingham Chapter of the American Society for Public Administration (ASPA) selected the Personnel Director of the Personnel Board, Lorren Oliver, as the 2008 recipient of the Administrator of the Year. ASPA is an organization that is committed to the advancement of excellence in the public service. Each year the chapter presents its Administrator of the Year Award at its Annual Meeting to a public service practitioner whose career exhibits the highest standards of excellence, dedication, and accomplishment. Mr. Oliver was presented the award at the ASPA Annual Meeting and Awards Luncheon on Friday, April 25, 2008.

All Personnel Board supervisors and managers are currently enrolled in the Board's Supervisory Certificate Program. It is essential that the Board's management team exemplify the skills, traits and behaviors of successful leaders and it is hoped that this training will add to the effectiveness of the leadership team. To date, three classes have been conducted ("Managing Change",

“Coaching for Success”, and “Customer Service Basics”) All courses are conducted by the Board’s Training and Career Development Department.

The *PBJC Supervisory Certificate Program* provides a foundation of supervisory knowledge and skills applicable to a broad range of positions. Core management principles and practices are woven through the curriculum and courses include “Delegating Authority”, “Managing Employee Conflict”, “Workplace Harassment”, “Effective Teams”, “Essential Leadership Skills”, “Giving and Receiving Feedback”, “Listening for Understanding”, “Merit System rules and Regulations”, “The Supervisor’s Job”, and two electives.

Continuous learning is an important goal for all Personnel Board staff and is viewed as a critical success factor in serving the Board’s customers. To this end, a number of staff attended professional conferences and workshops, including the 23rd Annual Society for Industrial/Organizational Psychology (SIOP) Conference, user conferences for Lawson and PeopleAdmin, and the EEOC Training Institute’s Technical Assistance Program. In addition, employee development is encouraged through internally developed continuing education meetings, outside training initiatives, and research, presentation, and publication opportunities.

To assure that the Board is reaching out to a broad and diverse population of applicants, recruitment marketing strategies have been utilized using media formats that reflect the diversity of the community. In addition, recruitment staff attend a variety of activities and events in the community to ensure diversity and inclusion while striving to identify the best qualified candidates for job classes.

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

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

Having registers available when jurisdictions need candidates is a primary objective of the Board. Creating registers quickly without compromising the integrity of the testing process is a strategic imperative. To accomplish this, new and more efficient test development methodologies have been implemented. The Board has moved to a job family based approach to analyzing jobs in order to improve the efficiency of the process, reduce the amount of time jurisdictions’

staff members are required to commit to providing subject matter expertise in the job analysis process, and create greater consistency in the analysis and qualifications for related job classes. Additionally, the Board is completing the development of a web-based Job Analysis Questionnaire (JAQ) intended to make subject matter expert participation in the JAQ process more convenient for jurisdictions and to improve the efficiency of the data collection and analysis process.

While the creation of registers in a timely manner is an important goal, providing lists of candidates from those registers to hiring jurisdictions quickly is equally important. Where a register exists, the goal of the Board remains to provide lists to jurisdictions within one business day. For the previous six months, lists have been provided, on average, in .19 days.

The Board utilizes its state-of-the-art systems to monitor work requests throughout the Board and to identify where efficiencies may be gained in its processes. A new management report that has been added to the dashboard tracks, by jurisdiction, the status of any Request for Certification from the time it arrives at the Board through any department that touches it to the point that a certification list is issued. This report calculates the processing time at any step of the process and allows the Board to determine, at a glance, where improvements may need to or can be made. The Board's data reporting and analysis capability has allowed it to respond to massive requests from the parties to the Board's consent decree in a timely, comprehensive, and paperless manner.

Keep the human resource needs of the jurisdictions central.

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

The Rules and Regulations serve as the basis of the Board's governance of the Merit System and are written to execute the mandates of the Enabling Act. The Rules are subject to periodic review to ensure that they are meeting the needs of both employees and appointing authorities. The current Rules were published in April, 2005. From October 19, 2007, through January 11, 2008, the Board invited appointing authorities, Merit System employees and the general public to

comment on the Rules and to submit suggestions for change. There were 111 responses.

The timely establishment of eligible registers is core to the success of the PBJC and the Merit System as a whole. Thus, developing and administering selection procedures in order to establish quality eligible registers in a timely fashion remains at the forefront of the Board's goals and mission. Since the 2007 annual report, eligible registers have been released for 137 job classes.

Maintaining up-to-date registers for public safety positions has been a top priority for the PBJC. During the period covered by this report, the PBJC has released registers for Police Officer/Deputy Sheriff, Firefighter, Police/Sheriff Sergeant, Police/Sheriff Lieutenant, Police/Sheriff Captain, Police Chief I, II, and III. Additionally, examinations have been administered for Fire Chief I, II, and III, Fire Battalion Chief II, and Fire Apparatus Operator. Registers for these positions are expected in May and June of this year.

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

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

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

The Board continues to utilize a zero-based budgeting process. This approach requires managers annually to justify and document the need for the monies requested in their budgets for each line item. Zero-based budgeting means that each department cannot assume that they will receive the same funding that they were given in the previous year and there are no automatic rollover assumptions. Each year, departments start with zero dollars and for all dollars requested there must be both justification and goals associated with the funds request. Once the budget is final and has been approved by the Three-Member Board, it is distributed to the appointing authorities and posted on the Board's website.

In July 2007, the Jefferson County Commission converted to a new financial system (SAP). Since the Personnel Board utilizes the County's purchasing and payroll systems, the Business Officer and support staff attended several training

classes in order to obtain assistance in processing purchase requests and gain additional information regarding the features of the new system. The Board worked in conjunction with the Jefferson County Purchasing Department to expedite the processing of purchase order requests, supply orders and payments to vendors.

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

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

The Personnel Board relies heavily on individuals from outside the Merit System as volunteers to assist in week long processes designed to produce high-quality assessments of examinations administered by the PBJC. In an effort to reduce costs associated with recruiting the volunteer assessors and those costs associated with providing lodging, the Board is undertaking the development of a certificate program to train and prepare individuals for assessment of employee selection measures administered by the PBJC. The Board anticipates that this will reduce time and cost associated with the recruitment process by strengthening the relationship with existing assessors while also increasing the quality of the overall assessments.

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

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

particularly should Jefferson County simultaneously invoice for multiple years. As of this writing, Jefferson County has distributed invoices to the jurisdictions for fiscal year 2006, and will soon bill them for fiscal year 2007.

As a means of fostering communications with and between Merit System employees, the Board has designed and developed a new website that promotes the open exchange of ideas and opinions and provides important and heretofore not readily available information of interest to employees. The site was designed based on input obtained from employee focus groups that were held during June, 2007.

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

As an additional means of sharing information, new applicants are receiving automatic emails thanking them for their application and explaining in some detail the hiring process. New employees are receiving automatic emails welcoming them to the Merit System and providing them with information regarding services available to them through the Personnel Board.

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

Data collected regarding sources of applicants reveals that for the previous six month period, 19.7% of all new hires were referred by existing Merit System employees. This makes employees a very important recruitment source. To recognize this, on April 1, 2008, Merit System employees who refer applicants who are subsequently hired receive a free tee-shirt.

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

Work to increase community awareness of PBJC services and activities.

A strategic imperative of the Personnel Board is to market the Merit System of Jefferson County as an employer of choice through the implementation of

comprehensive marketing and recruiting strategies that include newsprint, internet postings, event sponsorships, billboards, television, radio, direct mail, direct email, career events, and community outreach events, and direct contact (head hunting); electronic notification of openings to community organizations and churches; and, programs such as Link to Civil Service and Strengthen Educate and Train (SET); Merit Matters monthly newsletter, and the new My Merit Matters web site. Particular emphasis has been placed on branding JobsQuest in the greater Birmingham community through billboard advertising and sponsorship spots on WBHM radio. This has resulted in record visits to the site.

Involvement of employees in civic and community affairs and membership in professional associations is encouraged as a means of creating community awareness. Again this year, Board staff actively participated in the Susan G. Komen Breast Cancer Awareness campaign, collecting over \$4,000.00 through various fundraising activities. Additionally, Board staff helped raise \$705.00 for the March of Dimes WalkAmerica.

PBJC staff members are engaged professionally in such organizations as the Birmingham Society for Human Resource Management, (BSHRM), the Society for Industrial/Organizational Psychology (SIOP), the American Society for Training and Development (ASTD), and the American Society for Public Administration (ASPA). Involvement in these organizations promotes peer to peer information exchange, provides professional networking opportunities, and helps to educate the business community about the Board and its mission.

Future Plans

The following are Administration's future plans:

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

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

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

Conclusion

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

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

WORKFORCE DEVELOPMENT & APPLICANT SERVICES

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

In an effort to improve the efficiency and seamlessness of operations within the Board, the processes of initial application screening and issuing certification lists to hiring jurisdictions was transferred from Records Management to Workforce Development and Applicant Services.

Workforce Development & Applicant Services has eleven (11) FTEs – four Examination and Certification Specialists, two Administrative Assistants; a Recruiting Advisor; two Recruiting Representatives; an Administrative Specialist and a Manager.

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

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

State Community College, Miles College, Troy University, Gadsden State Community College, Jefferson State Community College, the University of South Alabama, and the Birmingham News.

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

Goal: Increase number of applicants for Nursing.

The current recruiting campaign will continue through December 31, 2008. As of April 30, 2008, 111 applicants have applied and had been added to the registers for LPN and Staff Nurse.

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

Goal: Increase number of Hispanic applicants for Nursing.

The current recruiting campaign will continue through December 31, 2008. As of April 30, 6 Hispanic applicants have applied for LPN or Staff Nurse.

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

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

The current recruiting campaign will continue through December 31, 2008. As of April 30, 169 female applicants have applied for Public Safety positions.

The 2007 recruiting campaign attracted 1,387 female applicants.

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

The current recruiting campaign will continue through December 31, 2008. As of April 30, 6 Hispanic applicants have applied for Public Safety positions.

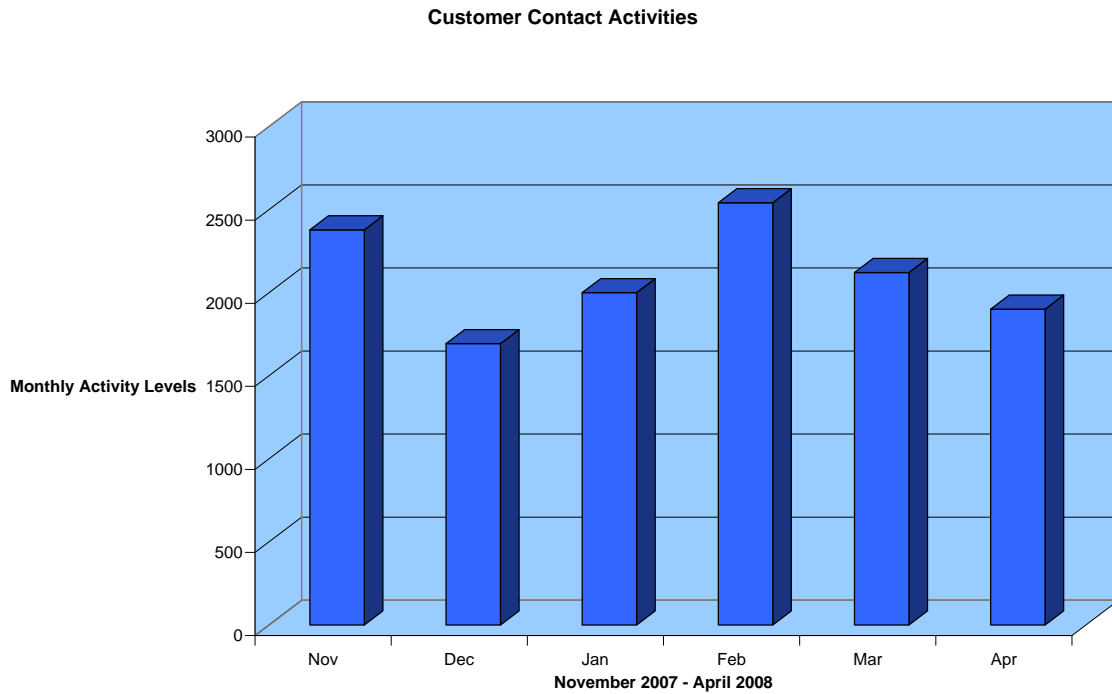
The 2007 recruiting campaign attracted 75 Hispanic applicants.

Applicant Services

The Applicant Services staff is usually the first contact with the Personnel Board that most individuals experience. Therefore it is critically important that this first impression is positive. The staff field questions for every department at the Personnel Board as well as many that are not Personnel Board-related. In the past six months, the staff managed over 12,000 contacts. They are ready to answer or find someone who can answer the many questions they receive. The

staff is also responsible for scanning and attaching supplemental documents such as transcripts, resumes, certificates and licenses to applicants' online applications.

The table and chart below provide total monthly customer contact activities and trends from November 1, 2007 through April 30, 2008



Customer Contact Activities

Activity	Nov	Dec	Jan	Feb	Mar	Apr	Total
Computer Kiosk Users	255	103	200	276	202	193	1,229
On-site/Remote Online Users Assisted	186	61	120	266	168	148	949
General PBJC Inquiries	1,297	1,052	790	1,058	908	834	5,939
Non PBJC Inquiries	117	82	98	112	112	106	627
Transfers/Referrals to PBJC Departments	355	230	598	661	628	517	2,989
IVR Files Processed	3	0	0	0	0	0	3
Emails Processed	165	165	194	168	103	103	898
Total Monthly Volume	2,378	1,693	2,000	2,541	2,121	1901	12,634

Recruiting

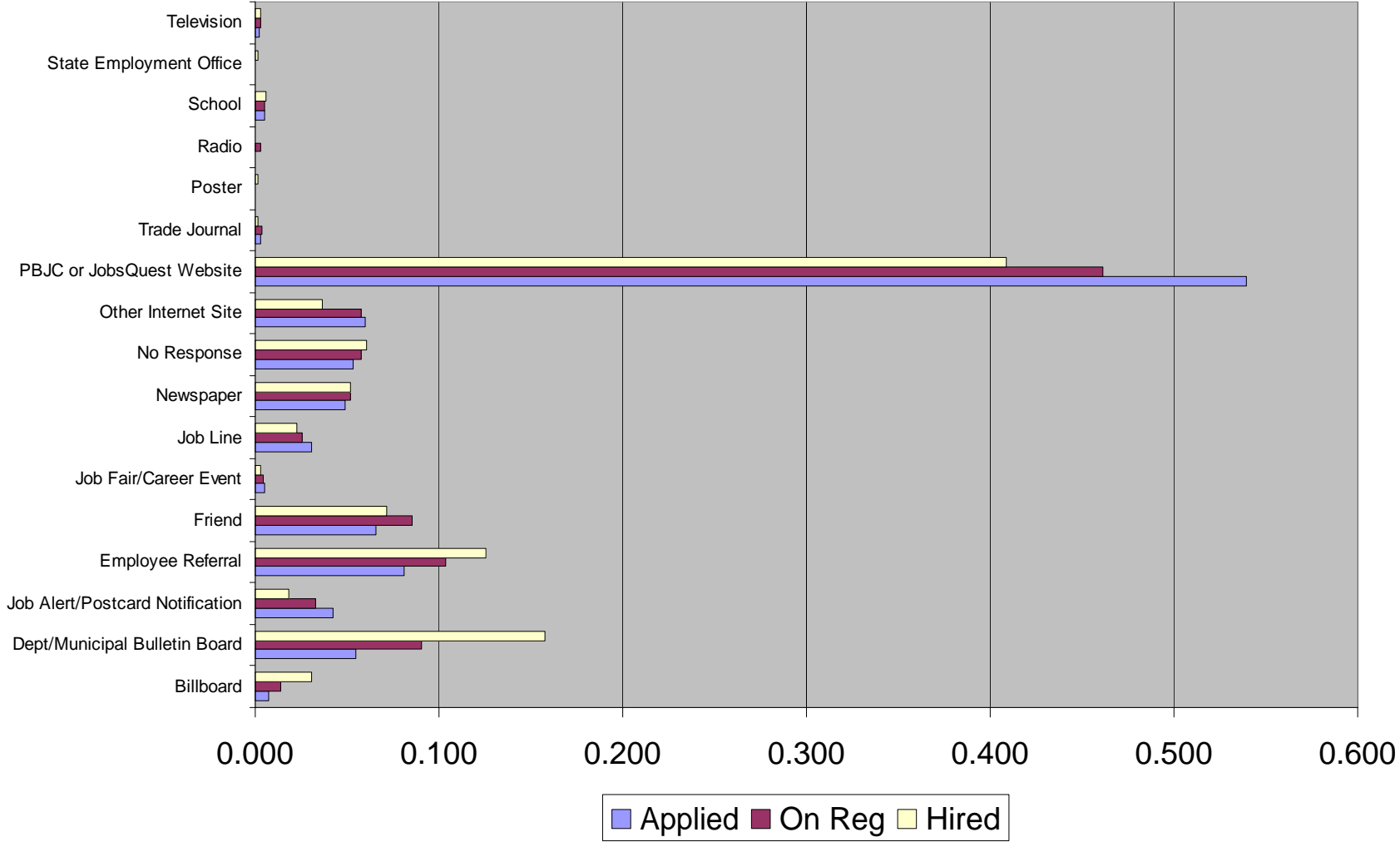
A Comprehensive Approach

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

The table below and chart on the following page shows a summary and totals for sources for applications, hires, and applicants placed on registers from November 1, 2007 through April 30, 2008.

Answer	Applied	%	On Register	%	Hired	%
Billboard	81	0.008	68	0.014	20	0.030
Department/Municipal Bulletin Board	585	0.055	433	0.090	104	0.158
Job Alert/Postcard Notification	452	0.042	157	0.033	12	0.018
Employee Referral	866	0.081	498	0.104	83	0.126
Friend	703	0.066	409	0.085	47	0.071
Job Fair/Career Event	56	0.005	21	0.004	2	0.003
Job Line	325	0.030	121	0.025	15	0.023
Newspaper	521	0.049	249	0.052	34	0.052
No Response	574	0.054	275	0.057	40	0.061
Other Internet Site	644	0.060	278	0.058	24	0.036
PBJC or JobsQuest Website	5785	0.539	2213	0.461	270	0.409
Professional Newsletter/Publication	33	0.003	18	0.004	1	0.002
Poster	2	0.000		0.000	1	0.002
Radio	8	0.001	14	0.003		0.000
School (Instructor/Professor/Counselor)	56	0.005	26	0.005	4	0.006
State Employment Office	11	0.001	3	0.001	1	0.002
Television	23	0.002	13	0.003	2	0.003
Total	10725	100.0%	4796	100.0%	660	100.0%

Source of Applications



PERFORMANCE MEASUREMENT

Overview

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

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

The overall mission of the Performance Measurement Division is to effectively serve the jurisdictions in the Merit System by developing fair, valid, and legally defensible selection systems in an efficient and customer-service oriented manner. In order to achieve this goal the Performance Measurement Division consistently works to improve the effectiveness of its work processes by staying abreast of developments in the field of employee selection and by leveraging available technology to improve the efficiency and accuracy of the work performed. Below are the goals set for the Performance Measurement Division for 2008. The progress toward achieving these goals and the activities and accomplishments of the division since the 2007 Annual Report are presented in subsequent sections.

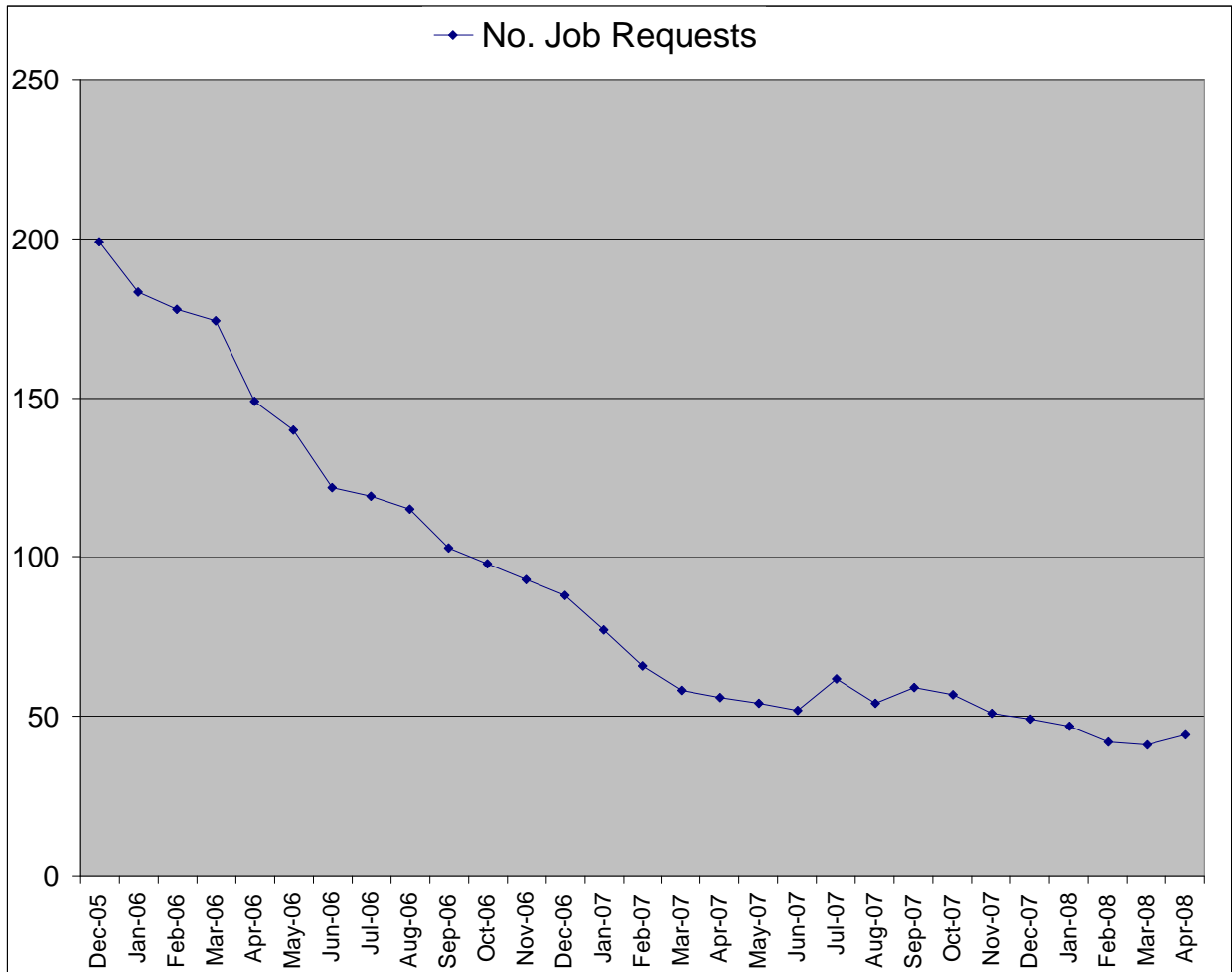
- Develop and administer selection procedures that identify the most qualified candidates for employment in the Merit System.
- Develop and implement a job family approach to conducting job analyses and developing selection procedures.
- Conduct professional development activities to ensure test development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

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

Active Requests

The primary function and goal of the Performance Measurement Division is to develop eligible registers for use by Merit System jurisdictions to fill vacant positions. The Performance Measurement Division constantly monitors its ability to meet the needs of the jurisdictions in a timely fashion by tracking the number of requests for certification lists for jobs in which no (or an inadequate) eligible register exists (i.e., requests referred to as being in “Testing Review”). As of April, 2008, 44 requests for certification lists were in testing review. This is a substantial reduction in the number of jobs in need of eligible register compared to previous months since the institution of the receivership (see Figure 1).

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



It should be noted that substantial work has been completed to ensure a suitable eligible register is established for each of these 44 job classes. Below is a breakdown of the status of these certification requests:

- Eleven jobs for which requests exist are currently announced as open continuous or open until filled due to a low number of qualified applicants and/or high turnover in the positions.
- Three jobs are in the 10-day appeal period. Registers will be released at the conclusion of the appeal period.
- Five jobs for which requests exist are currently announced (or are set for announcement during April, 2008) and applications are being accepted.
- Five jobs are currently in test development. Tentative test dates have been established.
- One job for which a request exists has completed test administration and scores are currently being calculated.
- Eight jobs are in the job analysis phase of the register establishment process.

- Four requests are on hold pending the resolution of various issues.
- The remaining seven jobs are newly assigned projects and will begin this month.

Public Safety Testing

Police Officer/Deputy Sheriff

The PBJC is constantly working to better meet the needs of its member jurisdictions. One area in which there is a pressing need is in the area of entry-level Police Officer/Deputy Sheriff. Traditionally, the PBJC recruited and tested for the job of Police Officer/Deputy Sheriff only once per year, and only within the Birmingham metropolitan area. The needs of the member jurisdictions, changes in the labor market, and competition from other cities have led the PBJC to transition to a continuous recruitment and application acceptance process, and monthly test administrations, for Police Officer/Deputy Sheriff. Under this process, Police Officer/Deputy Sheriff remains open for applications on a continuous basis, and PBJC tests and certifies candidates monthly instead of annually. All eligible candidates remain on the register for one year or until hired, whichever period is shorter. Progressing from annual to monthly testing allows for more competitive recruitment efforts, save money, and better meet the critical public safety needs of the member jurisdictions. The Performance Measurement Division has administered six monthly Police Officer/Deputy Sheriff testing sessions during the time period covered by this report.

Police Promotional Series

Since the 2007 Annual Report, the Performance Measurement Division has administered examinations and released eligible registers for Police/Sheriff Sergeant, Police/Sheriff Lieutenant, Police/Sheriff Captain, and Police Chief I, Police Chief II, and Police Chief III. Registers for Police Chief I, II, and III were released on November 6, 2007. Police/Sheriff Sergeant register was released on December 14, 2007. Police/Sheriff Lieutenant register was released on December 21, 2007. Police/Sheriff Captain register was released on December 20, 2007.

Firefighter

Over the past four years, the Performance Measurement Division has created new registers for entry-level Firefighter on an yearly basis. At this time, unlike Police Officer/Deputy Sheriff, Firefighter remains a job that is tested on an annual, rather than a monthly, basis. The rationale behind this decision is based primarily upon the nature of the examination process. The Firefighter job consists of two written test components and a structured interview. The structured interview greatly enhances the selection process for Firefighter, but makes monthly testing impractical at this time. After the 2008 administration of the written examination and the structured interview, the PBJC released a register for Firefighter on March 24, 2008.

Fire Promotional Series

Test development activities were conducted for Fire Chief I, II, and III during February, the administration of the examination was held on March 27, 2008, and the assessment was held March 31 through April 4, 2008. The register is anticipated to be released in May, 2008. Fire Battalion Chief II was developed in January and February of 2008. The administration of this exam was held on March 27, 2008 and the assessment was conducted March 31 through April 4, 2008. The register is anticipated to be released in May, 2008.

Applications for Fire Apparatus Operator were accepted in February, 2008. The assessment center was administered on April 7, 2008 and the practical test was administered the week of April 21, 2008. The register is anticipated to be released in June, 2008. The remaining two jobs in the Fire promotional series (i.e., Fire Lieutenant and Fire Captain) are slated for announcement and administration in the fall of 2008.

Additional Jobs

In order to ensure that the time required for the PBJC to fulfill a request for certification is minimized and to ensure that registers stay up to date, the Performance Measurement Division is also working on a significant number of jobs for which no unfulfilled request for certification is in place. There are currently 89 jobs actively being studied and/or tested in order to help more efficiently and effectively meet the future hiring needs of the jurisdictions. Since the submission of the 2007 annual report, the PBJC has posted job announcements, tested applicants, and released registers for 137 jobs. A list of these jobs for which registers have been released since November 1, 2007 is presented in the table below.

Table 1. Registers Released from November, 2007 through April, 2008

Job Code	Register Title	Job Code	Register Title
0063	Administrative Assistant I	7063	Nurse Supervisor
0117	Senior Legal Secretary	7071	Nursing Assistant
0831	Auto Parts Clerk	7073	Licensed Practical Nurse
0880	Principal Buyer	7075	Staff Nurse
1003	Auditor	7079	Charge Nurse
1027	Principal Accountant	7082	School Health Nurse
1029	Cash & Investment Manager	7084	Public Health Nurse
1031	Budget Analyst	7091	Flexipool Staff Nurse
1081	Director of Finance (Non-Jefferson County)	7092	LPN - Flexipool
1093	Director of Finance-JC	7095	Staff Nurse - Baylor
1133	Revenue Examiner	7096	LPN - Baylor
1135	Senior Revenue Examiner	7183	Diagnostic Imaging Technician (Radiographer)
2015	Grants Management Coordinator	7183	Diagnostic Imaging Technologist (Ultrasound)
2085	Senior Administrative Analyst	7184	Special Imaging Technologist(Nuclear Medicine)
2484	Senior Attorney	7184	Special Imaging Technologist(Ultra Sound)
2486	Principal Attorney	7184	Special Imaging Technologist(Radiographer)
2544	Senior Systems Architect	7184	Special Imaging Technologist
2552	Network Systems Administrator li	7193	Medical Laboratory Technician
2555	Senior Programmer	7194	Medical Technologist
2565	Senior Systems Programmer (Technical Support)-Birmingham	7243	Respiratory Therapist
2577	Geographic Information Systems Database Supervisor	7245	Cardiopulmonary Services Manager
2583	Systems Analyst (GIS)	7280	Speech Language Pathologist
2730	Statistical Analyst	7304	Water Pollution Control Technician(Barton Laboratory)
2849	Training Advisor	7304	Water Pollution Control Technician (Storm Water)
2863	Assessment & Development Specialist	7304	Water Pollution Control Technician(Bessemer & Irondale)
2886	Personnel Division Manager	7307	Senior Water Poll Control Technician
2963	Community Resource Representative-Hd	7375	Environmental Health Program Supervisor (Food & Lodging)
3109	Senior Civil Engineer	7407	Principal Dental Hygienist
3177	Assistant Director of Environmental Services	7493	Clinical Dentist
3327	Traffic Signs and Markings Supervisor	7540	Patient Activity Leader
3333	Traffic Planning Technician	7657	Director of Quality Improvement-JRHC
3335	Traffic Analyst	7677	Director of Hospital Education-CGH
3485	Engineering Inspector	7745	Nutrition Consultant
3487	Principal Engineering Inspector-Surveyor	7853	Health Information Services Technician
3525	Graphic Artist	7875	Deputy Director, Admin Services - JRHC
3580	Drafter	7877	Deputy Director of Nursing Services - JRHC
3584	Senior Engineering Drafter	7889	Chief Executive officer-Jefferson Health System
3610	Electronics Technician	7977	Clinical Pharmacist
3673	Land Acquisition Agent	8069	Public Works Coordinator
4132	Lifeguard	8082	Bridge Maintenance Worker

Job Code	Register Title	Job Code	Register Title
4169	Exercise Physiologist	8133	Meter Technician
4173	Fitness Instructor	8184	Maintenance Mechanic
4197	Director of Homewood Parks & Recreation	8265	Arborist
4321	Aircraft Museum Restoration Technician (Part-Time)	8267	Senior Arborist
4387	Museum Curator of Education, B'ham Art Museum	8271	Urban Forester
4415	Event Manager	8287	Landscape Crewleader
5024	Assistant Fire Chief-Hueytown	8295	Horticulture Maintenance Supervisor
5031	Firefighter	8335	Sewer Line Video Supervisor
5273	Chief Condemnation/Demolition Coordinator	8353	WWTP Maintenance Worker
5354	Zoning Inspector	8394	WWTP Shift Supervisor
5434	Sewer Service Inspector	8481	Power Distribution Helper
6031	Police officer/Deputy Sheriff	8484	Electrical Distribution Assistant Supervisor
6033	Police/Sheriff Sergeant	8485	Electrical Distribution Supervisor
6034	Police/Sheriff Lieutenant	8488	Electrical Operations Manager-Bessemer
6035	Police/Sheriff Captain	8533	Carpenter
6091	Police Chief I	8543	Plumber
6092	Police Chief li	8573	Painter
6093	Police Chief lii	8593	Electrician (Industrial)
6429	Animal Control Aide	8694	Facilities Manager-HD
6467	Latent Fingerprint Examiner	8697	Assistant Director of General Services
6475	District Attorney's Investigator	8699	Director of General Services - Jefferson County
6551	Security officer	8875	Assistant Bridge Superintendent
7003	Surgical Technician - Anesthesia Tech	9035	Cook
7003	Surgical Technician	9055	Food Services Supervisor
7015	Central Supply Technician Trainee	9057	Senior Food Services Supervisor
7023	Central Supply and Materials Supervisor	9093	Dietitian
7033	Clinical Nurse Practitioner	9173	Housekeeping Assistant
7036	Case Manager, RN	9179	Director of Housekeeping
7041	Minimum Data Set Coordinator		

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

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

In order to more efficiently and effectively study jobs for purposes of developing valid, fair, and legally defensible selection procedures, the Performance

Measurement Division has set a goal to implement a job family approach to conducting job analyses. A job family approach will improve over past procedures by:

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

The Performance Measurement Division has been working on completing job analyses using the job family approach since the beginning of 2008. Substantial progress has been made and the division is on track to complete job analyses for 20% of the Merit System job classes during 2008.

The online job analysis questionnaire (JAQ) is designed to make data collection, analysis, and information sharing more efficient and effective. The Performance Measurement Division projected the completion and implementation of the online JAQ by the submission of this report; however, technical difficulties with the server have led to slight delays in its completion. It is anticipated that the online JAQ will be completely functional by mid-June.

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

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

- A staff member from the Performance Measurement Division attended the 2007 Labor and Employment Law Seminar offered by Balch & Bingham held in Birmingham, Alabama on October 26 and 27, 2007. The seminar provided information on recent developments in labor and employment law, including those relevant to hiring and promotional processes.
- A workshop/presentation designed to keep members of Performance Measurement up to date on research and developments in the area of

employee selection was conducted by a team from Performance Measurement on January 30, 2008. The presentation covered research on assessment centers and ways in which this method of assessment can be improved.

- Seven members of the Performance Measurement Division attended the 23rd Annual Conference for the Society for Industrial and Organizational Psychology. In addition to attending seminars and other educational sessions, these staff members also presented various research and/or participated in conference seminars. The research/seminars in which PBJC staff were involved are listed below:
 - **Brink, K. E., Crenshaw, J. L., & Alber, M.** (2008). *Relationships between completion time, performance and faking on biodata/personality measures*. In K. E. Brink (Chair), *The fourth dimension: How response times impact test performance*. Symposium conducted at 23rd Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.
 - **Brink, K. E., Lance, C. E., Bellenger, B. L., Morrison, M. A., Scharlau, E. A., & Crenshaw, J. L.** (2008). *Discriminant validity of a "next generation" assessment center*. In B. J. Hoffman (Chair), *Reexamining assessment centers: Alternate approaches*. Symposium conducted at 23rd Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.
 - **Allman, R. P. L., II, & Sutton, M. D.** (2008). *Preparation time, response time, and performance on structured interviews*. In K. E. Brink (Chair), *The fourth dimension: How response times impact test performance*. Symposium conducted at the 23rd Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.
 - **Jeffrey Crenshaw** and **Lorren Oliver** were invited presenters for the 2008 Industrial & Organizational Doctoral Consortium designed to provide doctoral students realistic expectations for work within the field of Industrial & Organizational Psychology and tips for establishing their career.
 - Halpert, J. A., Stuhlmacher, A. F., **Crenshaw, J. L.**, & Litcher, C., & Bortel, R. (2008). *Paths to negotiation success*. Poster presented at 23rd Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.
 - Pritchard, R.D., Thornson, C.A., **Wicks, K.** (2008). Perceived instrumentality of an intervention: How important is metacognitive feedback? Poster presented at 23rd Annual Society for Industrial and Organizational Psychology Conference, San Francisco, CA.
- Presentations from several members of the Performance Measurement Division have been submitted and accepted for presentation at the International Public Management Association – Assessment Council 32nd Annual Conference on Personnel Assessment to be held in June. The presentations are listed below:

- **Brink, K. E. & Crenshaw, J. L.** (2008). *Adverse impact: What is it and how do you calculate it?* Tutorial to be presented at the International Public Management Association Assessment Council 32nd Annual Conference on Personnel Assessment, Oakland, CA.
- **Crenshaw, J. L., Bellenger, B. L., & Brink, K. E.** (2008). *Video based testing: Advantages, limitations, and practical feasibility.* Seminar to be presented at the International Public Management Association Assessment Council 32nd Annual Conference on Personnel Assessment, Oakland, CA.
- **Bellenger, B. L. & Dean, C. R.** (2008). *Cheating on promotional public safety examinations: Strategies for responding to a widespread test security compromise.* Seminar to be presented at the International Public Management Association Assessment Council 32nd Annual Conference on Personnel Assessment, Oakland, CA.

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

The PBJC continuously reviews how work is performed within the organization in order to ensure that the work processes and structure are set up in a manner that is efficient, cost effective, and results in high quality work. One initiative that is designed to address this goal is the transition of the process of creating announcements and screening applications from the Performance Measurement Division to the Workforce Development & Applicant Services (WDAS) Division. This transition is designed to enhance the cost effectiveness of the work performed and improve service by bringing closer together the recruiting and applicant screening functions. Although the PBJC projected to be further along in the transition, the process is still in its initial phases due to the heavy burdens of the consent decree discovery process placed on both the Performance Measurement and WDAS divisions. Currently, two positions from Performance Measurement have been re-assigned to WDAS. These positions, along with other positions within WDAS will assume the responsibility of creating announcements for applications and the screening of applications against pre-established minimum qualifications. Training of WDAS staff on needed computer programs and software has begun, but additional training is still necessary. Once the training is complete, the Performance Measurement Division will begin to transition announcement development and application screening to WDAS.

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

Developing effective relationships between the PBJC and its customers is key to providing effective service. Educating the general public to the principles of merit/civil service systems and the employment processes within the PBJC Merit


System, will greatly enhance the quality and quantity of applicants interested in employment within our system. To this end, the Performance Measurement Division has been working on a project to help provide greater information to internal and external customers and the general public. The project is the development of a video "orientation" to the PBJC testing procedures, register establishment processes, Merit System principles, and the Merit System's member jurisdictions and agencies. The purpose of this project is to provide extensive information to current Merit System employees, potential applicants and recruits, and jurisdiction leaders in an efficient and cost effective manner. Once developed, the video orientation will be able to serve as both a recruiting and an educational tool that can be presented to candidates during test administrations, provided over the internet to interested individuals, and distributed in DVD form to potential applicants at career fairs or other recruiting functions. A project development team has been assembled and the planning of the project is currently underway.

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

Another goal of this division is to enhance the recruiting of volunteer assessors to assist in evaluating the performance of candidates on selection procedures administered by the PBJC. To accomplish this, Performance Measurement is undertaking the development of a certificate program to train and prepare individuals for assessment of employee selection measures administered by the PBJC. The purpose of this project is to (1) capitalize on the PBJC's technological capabilities in order to create an enhanced assessor training program, and (2) establish greater relationships with volunteer assessors to enhance their experiences and increase the likelihood of continuing the working relationship in the future. By creating a certificate program, the PBJC can reduce costs associated with recruiting assessors by strengthening the relationship with existing assessors and reduce costs associated with assessor overnight stay by reducing the number of repeat assessors who must arrive earlier for assessor training. A project development team has been assembled and the planning of the project is currently underway.

Moving Forward

Overall, the Performance Measurement Division has made significant strides toward achieving its goals presented for 2008. The short-term interim goals are being set to ensure that the division remains on pace to achieve all goals outlined for the year. The Performance Measurement Division believes that continued progress toward achieving the outlined goals and greater collaboration among departments will lead to continued improvement of the functions and services provided by the division and the overall organization.



TRAINING & CAREER DEVELOPMENT

Overview

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

Training and Career Development is approved for staffing of five (5) FTEs - four Training Advisors and one Training Assistant.

Training is currently in the process of backfilling these roles. The department is currently staffed by Pete Blank, Training Advisor, and Josh Gilliam, Training Advisor.

Activities and Accomplishments

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

PROJECTS

Specialized Jurisdictional Training

In February, training traveled to the Jefferson Rehabilitation and Health Center (JRHC) to deliver a specialized series of classes to RN's and LPN's titled "The Management Series." The three core courses were "Managing Change", "Managing Employee Conflict" and "Managing Customer Service." These courses were held over a three-day period. Evaluations and anecdotal data showed that the classes were well-received by all in attendance. Training continues to work directly with the JRHC Leadership team to provide training that fits the needs of their employees and staff.

In December, Training led “How to Motivate Merit System Employees” for the Jefferson County Department of Health Dental Division as part of their all-team day.

Training was happy to partner with Jim St. John from the Vestavia Hills Fire Department to provide two training sessions as part of their training initiative. In December, we conducted an “Effective Performance Appraisals” class to 20 officers at VHFD. Then in February, we returned to lead a session on “The Supervisor’s Job” to 17 Apparatus Operators.

In April, training traveled to Jefferson County Family Court to lead a session on “Microsoft Publisher Basic”. Due to the wireless setup in their facility, training was easily able to work with this group to fill their needs. The success of the event will hopefully lead to other on-site computer training courses.

Cooper Green Mercy Hospital and PBJC Training worked together in April to provide specialized training for administrative assistants from Cooper Green. Two day-long events were held in the classrooms at the 2121 building, and they were designed with both fun and learning in mind. Over 50 Merit System employees attended to learn about new policies and procedures, and well as personal hygiene and customer service. Training provided a three-hour session titled “Excelling at the Front Desk”, which dealt specifically with first impressions and phone etiquette.

Due to the high demand for Excel training classes, the training department has offered five special, City of Birmingham-only classes. These were done to eliminate the backlog of training requests the city held. Training will continue to offer the classes as long as demand remains.

Delivery of Supervisory and Computer Training courses

Attendance continues to grow in all PBJC Training courses. From November 1, 2007 – April 30, 2008, the total number of participants in classes was 1,198.

New training offerings continue to be developed as well. In April, training conducted an alpha pilot of a new ethics course titled “Keeping and Building the Public’s Trust.” In addition, three new offerings will be piloted in Summer 2008. They are “Cultural Competency”, “Diversity Awareness Training”, and “Building a High Performance Team”.

Needs Analysis

From October 10 – November 2, Merit System employees were given the opportunity to complete an electronic training needs survey. 535 surveys were completed and returned. Topics included preferred day of week for training, preferred time of day for training, barriers to attending training, most/least requested training topics, and more.

With the assistance of our marketing intern, Andrea Salazar from UAB, training analyzed the data and make specific changes based on the data. Some changes and/or enhancements that are in the works include:

- Offering classes primarily on Wednesdays, followed by Tuesdays and Thursdays
- Increasing our marketing strategy for classes, as up to 35% of Merit System employees did not know we offered supervisory and computer classes.
- Increasing our offerings of Microsoft Excel and Microsoft PowerPoint classes, as they were the most requested.
- Continuing to offer most of our classes in the morning as opposed to the afternoon
- Communicate the R.O.I. of training to the jurisdictions to assist in minimizing the obstacles that employees face when trying to attend training

Supervisory Certificate Program

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

Since its inception in 2006, 42 Merit System employees have completed the program, with another 37 scheduled to graduate in May 2008.

Supervisory Certificate Program Graduation Celebration

On the morning of October 10, training hosted a special Supervisory Certificate Program Graduation Celebration at the Jefferson Rehabilitation and Health Center (JRHC). The event was held at the formal dining room of the JRHC. The 19 recipients, all JRHC employees, were recognized at the event for their accomplishment.

A formal breakfast was served, and this allowed time for recipients, leaders, supervisors, and appointing authorities to mix, mingle and congratulate one another. Following breakfast, Lorren Oliver, Director, PBJC, congratulated the recipients and then introduced Dr. Bill Service, Associate Professor, School of Business, Samford University. Dr. Service spoke on the importance of leadership.

This event ended with the presentation of the framed certificates, and was viewed as a success by all in attendance. The next graduation celebration will be held on May 7.

Marketing Intern

In an effort to increase the marketing efforts of the training department, the decision was made to hire a marketing intern. In January, Andrea Salazar joined the training team. Andrea is in her final semester at the University of Alabama – Birmingham where she is studying marketing.

Andrea has been instrumental in assisting the training team by completing the following projects:

- A full-scale review of the current marketing plan for Training as well as Workforce Development and Applicant Services
- A thorough analysis of the 2007 Training Needs Analysis
- Redesign and/or re-creation of our current marketing materials
- A complete proposal of future steps and actions plans needed to increase the number of training participants

Building and Keeping the Public's Trust training course

Training has been coordinating efforts with the Jefferson County Human Resources Department to offer "Building and Keeping the Public's Trust". This course is designed to detail not only the letter of the law but the civil servants responsibility to the public and their coworker.

The course was piloted in April with the Workforce Development and Applicant Services Department. After modifications are made the training will be instituted to all PBJC employees and then offered to all jurisdictions.

CareerZone

CareerZone was designed and developed to replace the costly Aspen Learning Management System. CareerZone went online in January 2008. There have been no major user errors and the system has operated smoothly since that time. Currently modifications to enhance the scope of CareerZone are being made.

These include:

1. A certificate tracking system so that users and the Training Department can track progress towards the completion of our certificate programs.
2. Expansion of the admin side of the system to allow jurisdiction to add, modify and schedule their independent training offerings and events.

TRAINING’S SPECIFIC DEPARTMENTAL GOALS FOR FY 2008

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

Training will be partnering with Jefferson State Community College to present a program titled “Summer Learning Series 2008”. Four different community education classes will be offered at the 2121 building in the summer evenings to allow Merit System employees to attend some learning opportunities while minimizing travel time to Jefferson State campuses. Offerings include:

- How to sell on eBay May 20
- How to be a Savvy Traveler June 16
- Digital Photography in one Evening June 24
- Instant Piano for Busy People June 30

The Training team will measure attendance and satisfaction levels to determine the success of the program and the viability of future programs.

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

In August, training will host a series of executive development classes known as the LEDGE (**L**Eadership **D**evelopment for **G**overnment **E**xecutives). This alpha pilot program will take place from 8:30am – 12noon on August 6, 13 and 20. The goal is to get higher-level Merit System employees together to network, learn the latest in leadership tools and provide an introspective look at their own style of leadership.

Participants must be in roles such as deputy director, city manager, fire chief, police lieutenant, or some other position of high-level decision making in their jurisdiction.

Training attended the Jefferson County Mayor’s Association Meeting on January 17th at Samford University to explain the program, and ask the mayors for their assistance in garnering pilot participants from their jurisdictions. In additions, all Appointing Authorities were sent an e-mail invitation in April to send a representative from their jurisdiction to attend the pilot program.

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

The PBJC Training Team is passionate about continuing education. To stay competitive in the market, it is essential that the training advisors stay current in training concepts, technology, and business acumen. To that end, the training team has accomplished the following:

Pete Blank accepted a role as Vice President of Communications for the Greater Birmingham Chapter of the American Society for Training and Development. As a board member, he is responsible for sharing chapter information with over 100 members. This also allows him to share information about the PBJC with other training professionals in the Birmingham business community.

Pete has also attended 6 local ASTD meetings and 1 Birmingham Society for Human Resources (BSHRM) meetings. Topics covered include Generations in the Workplace, Designing an Internal Certification Program, Effective Meetings, and more.

In January, Pete attended a two-day computer course on Microsoft Access offered through New Horizons computer training. Training will continue to partner and share best practices with Bill Ivey of New Horizons-Birmingham.

In February, Pete attended the Training 2008 Conference and Expo in Atlanta, GA. Through networking, concurrent sessions and executive speakers, Pete returned with a plethora of information that he has applied to his training classes at the PBJC.

Josh Gilliam has been attending ASTD meetings during the months of March and April.

Josh has also been working with Mickey Gee of the UAB School of Business regarding internships. We are working on a means to connect the students at UAB who need internships to potential places in the Merit System where an internship can create a mutually beneficial environment for student and jurisdiction alike.

Josh will also be starting the MBA program at UAB.


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

During 2007 and 2008 Training has been determining the proper curriculum and requirements for the Basic Computer Skills Certificate. This certificate will provide to graduates the ability to competently navigate a PC, utilize the majority of the

Microsoft Office Application Suite and demonstrate a typing speed of at least 45 words per minute.

The certificate is set to be announced at the May 2008 graduations ceremony followed by a mass announcement to the Merit System. Potential candidates for the certificate must demonstrate a typing speed of 20 words per minute or they will have to complete the Keyboarding course. All graduates will demonstrate a typing speed of 45 words per minute utilizing the exact same standards and examination administered by Performance Measurement.

Courses that comprise the certificate program will appear in third quarter training calendar.



CLASSIFICATION AND COMPENSATION

Overview

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

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

The Classification and Compensation Department is currently staffed at three FTEs - a Compensation Manager who is a Certified Compensation Professional with over 19 years of human resources experience and two Compensation Advisors with over 37 years of combined experience in the Merit System.

Activities and Accomplishments

A principal activity of the Classification and Compensation Department during the reporting period was conducting the 2007-2008 Annual Classification Survey that began July 1, 2007 and concludes with a public hearing on May 23, 2008. Classifications in the following job families were included:

Fire Protection
Police
Sheriff
Security Guard.

During the Survey, one thousand nine hundred seven (1,907) Position Description Questionnaires (PDQs) were submitted and reviewed. This represents 61% of the population of employees eligible to submit PDQs, which is slightly lower than previous years. It is conjectured that this is due to the high degree of homogeneity in the classifications being studied (public safety series). The remaining 39% (1,237) either did not start the PDQ process or did not submit any changes for supervisory approval. In these cases, it is assumed the employees are acknowledging that their classifications are appropriate.

Two hundred five on-site job audits were conducted. This resulted in ten (10) recommendations for reclassification. As of April 18, five (5) appeals had been filed and are being reviewed by the Classification and Compensation staff. A public hearing is scheduled for May 23, 2008.

Communications with employees about the Survey process continues to be an area of focus. Communication with employees is primarily through appointing authorities, human resource departments, payroll coordinators and department heads. As a means of supplementing this communication channel, all information relating to the Annual Survey can be accessed by employees on the Board's web site, www.pbjcal.org. Information regarding outcomes and recommendations is communicated *via* the Board's Interactive Voice Response (IVR) system. Additionally, there are several Survey-related articles in the Merit Matter newsletter throughout the process.

Additional Activities:

New Classes*:	7
New Positions:	153
Reclassifications:	3
Advanced Step Approvals:	50
Labor Market Surveys:	6
Contracts Reviewed:	45

*New Classes Created:

- Audio Visual Technician
- Information Specialist OSCS
- Nurse Supervisor
- Records Management Manager
- Records Management Analyst
- SAP Application Specialist
- Speech Language Pathologist

Also during the report period, the Classification and Compensation staff continued the process of aligning classification specifications with the most recent job analysis information collected by Performance Measurement. To date,

50 positions have been reviewed and classification specifications adjusted as needed. This will be an ongoing process and will assure that classification specifications published by the Board are up-to-date and consistent with information collected by the Performance Measurement staff during the job analysis phase of test development.

Another undertaking of the Classification and Compensation staff was the review of independent contractor agreements. Pursuant to §2 of the Enabling Act, the Board is charged with the responsibility to determine if work described in contracts contemplated or being performed by contractors engaged by jurisdictions can be performed as well, practically, expeditiously, or economically by Merit System employees. Of the forty five (45) contracts reviewed, thirty-nine (39) were approved and six (6) were denied based on the duties outlined in the contracts and the availability of classes within the Merit System to perform the work.

The Classification and Compensation staff also led a process of reviewing the duties performed by laborers of the City of Bessemer and of the Jefferson County Commission. Individuals performing laborer duties consistent with §1 of the Enabling Act may be unclassified. The objective of the review was to validate the jurisdictions' use of laborers by identifying major tasks and the percentage of time the individual spent on each one. The staff teamed up with members of the Performance Measurement Department and interviewed a total of 110 laborers in the City of Bessemer and 205 in Jefferson County. For The City of Bessemer, 57% of the individuals interviewed were recommended to remain as laborers while the other 43% were recommended for appropriate Merit System job classes. The City of Bessemer presented an action plan that included changing duties of some individuals so as to be more in line with the definition of laborer while recommending others to become classified positions. For Jefferson County, 62% of the individuals interviewed were recommended to remain as laborers while the other 38% were recommended for Merit System job classes. Discussions with Jefferson County are still underway, as some of the interviews occurred in March. The final recommendations should be complete in May.

Future Plans

- Complete the 2007-2008 Annual Classification Survey and begin the 2008-2009 Survey
- Improve the communication with merit system employees and appointing authorities regarding the Survey process
- Develop and conduct a customized salary survey of selected (benchmark) merit system classes that are unique to government environments
- Continue to align class specifications with job analysis information developed by Performance Measurement

- Create a management report to audit and monitor employees currently receiving premium pay to assure continued eligibility

EMPLOYEE RELATIONS

Overview

Employee Relations endeavors to take proactive steps to reduce workplace conflict, prevent unnecessary and costly litigation, and promote positive working relationships within the Merit System. The department is dedicated to serving the Merit System by functioning as a resource for jurisdictions and by supplying information and assistance as related to matters concerning the Rules and Regulations, policies and procedures, federal and state law (especially the Enabling Act) that impact the Personnel Board and Merit System.

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

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

Disciplinary appeals (appeals by employees of dismissals, suspensions, or demotions)

Grievances (complaints filed by employees against other employees or supervisors)

Paid injury leave appeals

Citizen's complaints (complaints against employees from non-employees)

Administrative leave with or without pay

Fitness for duty examinations

Reductions in force

Activities and Accomplishments

During November 2007 through April 2008, Employee Relations received notification of 119 employee actions (grievances, disciplinary appeals, etc.). 69 of the 119 actions received were not eligible for appeal in accordance with PBJC Rules and Regulations. 50 of the 119 actions received were eligible for appeal in accordance with PBJC Rules. However, actual appeals were filed in only 27 of the 50 actions eligible for filing an appeal (see tables below).

	Not Eligible for Appeal
Suspensions	37
Dismissals	4
Reprimands	16
Command Discipline	1
Administrative Leave with Pay	11
Total	69

	Eligible for Filing	Actual Appeals
Suspensions	16	8
Dismissals	18	13
Demotions	2	1
Grievances	8	0
Paid Injury Leave (IWP)	5	5
Administrative Leave without Pay	1	0
Total	50	27

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

Future Plans

Historically, the Employee Relations Department has primarily functioned to process existing complaints, grievances and appeals and other matters through the system for consideration by the members of the Personnel Board. The Employee Relations Department has increasingly implemented efforts to become more proactive in problem prevention and conflict resolution in order to enhance the services that staff provides to Appointing Authorities, Merit system employees and the general public.

Employee Relations' goals for the calendar year 2007-2008 are outlined below:

- Have quarterly "Meet and Greet sessions ER staff" sessions during the year. General topics on the operations and the types of services provided by Employee Relations staff will be discussed in two sessions and

specific topics of interest (ie. reductions in force, nuts and bolts of hearing process, etc.) will be discussed in two sessions. Information will be advertised in Merit Matters, PBJC website and postings in the building on upcoming sessions. The first session was held on October 11, 2007 in the Hearing Room at the Personnel Board of Jefferson County. Staff addressed questions from the audience on the grievance process and Injury with Pay (IWP) appeals.

- Provide answers to Frequently Asked Questions (FAQs) from the Employee Relations Department in Merit Matters, a monthly publication of the Personnel Board of Jefferson County for Merit employees and on a user content generated website for the Personnel Board of Jefferson County that will be available for Merit employees on a regular basis during the year.
- Develop a referral list of agencies to address frequent inquiries to staff at the front counter in the WorkForce Development and Applicant Services (WDAS) Department and distribute to other departments at PBJC.

RECORDS MANAGEMENT

Overview

The Record Management Department 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. Until January 2008, Records Management was responsible for issuing certification lists. This function was transferred to Workforce Development and Application Services Department.

This Department is responsible for assuring that all personnel actions are consistent with the Rules and Regulations, as well as with PBJC operating policy and procedure. The Department continually reviews electronic transactions and assures that all system edits and validations are working as designed. In addition, the staff reviews error reports, resolves processing problems, and provides end-user assistance. The Records Management Department is also responsible for distribution of Personnel Performance Appraisals to evaluating supervisors served by the Board.

The Department has six (6) FTEs – four Records Management Specialists, one Administrative Assistant II, and a Team Leader.

Actions handled by the Department include:

- Requests for production of employee documents
- Certification of payrolls
- Processing personnel actions
- Administration of the Performance Appraisal process
- Processing requests for transfers, reinstatements, and limited appointments

Activities and Accomplishments

The Board's integrated electronic HR system has now been operational for over three and one half years. The objectives that the Board hoped to achieve through implementation of this technology have been realized and, overall, the system has operated in a very satisfactory manner. Periodic upgrades to functionality (patches) are required to achieve optimal performance. During the report period, several major patches were applied requiring substantial involvement of the Records Management staff to re-test all existing customizations, modifications, and forms.

Since November 1, 2007, the Department has processed:

- Two thousand eight hundred forty (2,840) personnel actions.
- Ten (10) Provisional Appointments
- Thirty (30) Transfers
- Seventeen (17) Reinstatements
- Three (3) Emergency Appointments
- Four (4) Voluntary Demotions
- Fourteen (14) Executive Exempt appointments
- One (1) Intergovernmental Transfer
- Fifteen (15) Interns
- Eleven (11) Temporary Appointments

Future Plans

- Significant accomplishments have been made by the staff toward clearing a backlog of personnel actions. The backlog is a normal by-product system validations and edits designed to stop actions that do not meet pre-defined business rules. The Records Management team is committed to minimizing the backlog.
- 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.

INFORMATION TECHNOLOGY

Overview

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

System Support

Activities of the System Support unit include:

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

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

Lawson

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

PeopleAdmin

PeopleAdmin is the Board's web-accessed applicant management system. The system provides the capability for applicants to create online applications and to apply to open jobs. Since September, 2004, 44,199 applicants have filed 130,988 applications using the online application. Applications filed average 3,046 per month. PeopleAdmin also provides the capability for jurisdictions to submit requests for and receive certification lists electronically. In addition, PeopleAdmin contains an online Position Description Questionnaire module that is used by jurisdictions to request that new positions be established, to request the reclassification of existing positions, and is used by employees participating in the Annual Classification Survey to provide information about their positions.

CareerZone

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

Sigma

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

ImageNow

ImageNow provides the Board with document imaging functionality. It allows the PBJC to capture document images, index, store, and retrieve those images online. ImageNow has replaced over two million paper documents to date.

Activities and Accomplishments

A major accomplishment during this reporting period was the upgrade and implementation of the Personnel Board imaging software. This enhancement included updated security features and a document management module. This

module will give system users the ability to check documents in and out of the system and will track all document changes.

The Information Technology Department continues to support PBJC departments by providing continuous availability of the Interactive Voice Response (IVR) system. In the past six months the IVR system has logged over 11,124 calls from applicants and Merit System employees. The system has handled some 50,000 calls since it was implemented.

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

Information Technology continues to replace Board desktops computers according to an established computer rotation schedule. During this reporting period 20 new computers were installed. According to the Board's decommissioning protocol, the decommissioned computers are "wiped" and the hard drives removed for destruction by an off-site vendor. Later in the year, the computers will be sent to the Jefferson County warehouse where they will be auctioned. Proceeds from the sell of Board computers will then be deposited to the Board's account.

Information Technology along with the Records Management Department worked together to upgrade the Lawson 8 environment to the latest service packs. This upgrade was installed in the Lawson development and test environments. Records Management along with the Information Technology Department performed testing scenarios in the development environment to make sure all modules and interfaces were working correctly. Testing will resume in the test and production environments once priority issues has been resolved.

The Department completed the design and development of a new website, www.meritmatters.org. Referred to as My Merit Matters, this site is designed specifically for Merit System employees. The site's features include a newsroom, a discussion forum, and a classifieds section. In addition, the site provides merit system employees information regarding vacancies through out the Merit System, allows employees to post transfer resumes, and provides jurisdictions with the capability to search for transfer candidates interested in their jurisdictions.

Future Plans

- Upgrade the Lawson system to version 9.0. The old version is being decommissioned and all clients are required to upgrade to the new foundation by July, 2009. This foundation and application upgrade will update back and front end processes of our Lawson software with minimal changes to the end user. Member jurisdictions will notice faster response time when retrieving employee records and other pertinent merit system employee information. Migrating to this product will require a significant effort and commitment of resources on the part of the Board and the IT staff.
- Continue to upgrade the Board's websites. In addition to new functionality, the sites' coding is being rewritten to assure greater stability. The sites are also being adapted to be more intuitive and user-friendly as well as more accessible by people with visual disabilities.
- Offer jurisdictions the opportunity to utilize the Board's web design and technology. Using the Board's web service as a platform, the following benefits could be achieved:
 - Cost reduction to jurisdictions by eliminating design, development and maintenance of their websites by external vendors
 - User interface standardization increasing web presentation effectiveness
 - Content modification from anywhere through the internet
 - Access to the most current web technology
 - Integrated site usage statistics would provide additional information about their web user's usage and patterns
- Work with the City of Birmingham to eliminate their backlog of personnel actions. This will be a labor and time-intensive undertaking. This backlog has been created due to uncorrected problems with the City's interface file.
- Explore the feasibility and benefits of installing virtual server technology to replace the Board's existing server infrastructure.

DATA MANAGEMENT

The Data Management unit is responsible for supporting the reporting and analysis needs of PBJC departments and jurisdictions. Since the Board has transitioned from a manual to an electronic environment, the ability to design and develop reports and reporting tools and to analyze information contained in the IT systems are critical support functions. The Data Management staff creates standard and ad hoc reports used in decision making, designs and develops databases, and assists other areas of the Board with understanding not only what data is available, but how data can be used to guide strategic planning and to monitor and improve operations.

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

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

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

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

Activities and Accomplishments

Data Management has developed a comprehensive training document that defines the business rules for calculating seniority for purposes of awarding promotion points, for reduction-in-force determinations, and for determining eligibility for examinations. A high level document outlining the business rules for calculating seniority and eligibility has been developed and published to the

Board's Intranet. This more detailed document will be used as an internal training document. A total of 1,201 seniority & eligibility points were calculated during this report period.

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

A new procedure for sending applicants thank you emails and new employees welcome emails was put into production last fall. The applicant letters provide information on how the Merit System hiring process works and the employee letter provides information on resources available through the Personnel Board. For the report period, a total of 9,380 applicant letters and 291 new employee letters were sent out.

The Department continues to work closely with end-users to add design features to existing databases to enhance their functionality, and to create new databases as needed. A total of 7 databases were created for this report period.

An important service offered by the Board to users of its online systems is the PBJC Help Desk. The Help Desk is staffed by Data Management personnel during normal business hours and may be accessed either by phone at (205) 279-3444 or by email at systemsupport@pbjcal.org. For the report period end, the Help Desk had received 4,604 calls and 240 email tickets for assistance.

Future Plans

- Enterprise Reporting provides jurisdictions online access to HRIMS custom and standard reports. This roll-out will be implemented after Lawson LSF 9.0 conversion.
- An ongoing goal of the Department is to continue to review the reports in production, decommission the reports that are not being utilized, and create new reports as needed.