

# The Merit System



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2007 Annual Report

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The Personnel Board of Jefferson County

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Report Period  
November 1, 2006 – October 31, 2007



## **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**  
**May 2007**

<p>Judge Alan King Probate Judge, Chairman 120-1 Jefferson County Courthouse 716 Richard Arrington Blvd. North Birmingham, AL 35203</p> <p>325-5203 214-4056 (FAX) <a href="mailto:kinga@jccal.org">kinga@jccal.org</a></p>	<p>Allen Rogers County Employee Representative 6925 Odom Road Gardendale, AL 35071</p> <p>631-2080</p>
<p>Dr. Thomas A. Westmoreland President Samford University 800 Lakeshore Drive Birmingham, AL 35209</p> <p>726-2011 726-2061 (FAX) <a href="mailto:tawestmo@samford.edu">tawestmo@samford.edu</a></p> <p>Rebecca Williamson (Assistant) <a href="mailto:rswillia@samford.edu">rswillia@samford.edu</a></p>	<p>Kirk Patrick President Jefferson County Labor Council 1128 Hardwick Lane Birmingham, AL 35209</p> <p>942-8203 <a href="mailto:patrickk@usa.redcross.org">patrickk@usa.redcross.org</a></p>
<p>Russell Cunningham President Chamber of Commerce 505 North 20th St., Ste. 200 Birmingham, AL 35203</p> <p>324-2100 (Ext. 8100) 324-2317 (Fax) <a href="mailto:russelc@birminghamchamber.com">russelc@birminghamchamber.com</a></p>	<p>David Pollick President Birmingham Southern College P.O. Box 9002 900 Arkadelphia Road Birmingham, AL 35254</p> <p>226-4600 OR 226-4620 226-7020 (Fax) <a href="mailto:pollick@bsc.edu">pollick@bsc.edu</a></p>

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

<p>Dr. David S. McKee, Jr. President Jefferson County Medical Society 2660 10th Avenue South Birmingham, AL 35205</p> <p>933-8601 939-0680 (Fax) <a href="mailto:pcpra@nephrologypc.com">pcpra@nephrologypc.com</a> or Martha Waters Wise, Executive Director</p>	<p>Dr. Perry W. Ward President Lawson State Community College 3060 Wilson Road Southwest Birmingham, AL 35221</p> <p>925-2515 (Ext. 302) 923-1649 <a href="mailto:pward@lawsonstate.edu">pward@lawsonstate.edu</a></p>
<p>Dr. Judy M. Merritt President Jefferson State Junior College 2601 Carson Road Birmingham, AL 35215</p> <p>853-1200 856-1764 (Fax) <a href="mailto:jmerritt@jeffstateonline.com">jmerritt@jeffstateonline.com</a></p>	<p>Chief Douglas McBee Municipal Employee Representative 4259 Pebble Garden Way Center Point, AL 35215</p> <p>or 421 Lakeshore Loop Highland Lake, AL 35121</p> <p>854-4444 <a href="mailto:chiefmcbee@cs.com">chiefmcbee@cs.com</a></p>

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

The following individuals have been elected to fill the positions of County and Municipal Employee Representative for 2007-2008:

<p>Sgt. Cecil Tidmore Jefferson County Sheriff's Department 1923 Rock Spring Road Warrior, AL 35180</p>	<p>County Employee Representative 647-5336 <a href="mailto:tidmorec@jccal.org">tidmorec@jccal.org</a> Replaces Allen Rogers</p>
<p>Lt. Jerry R. Mahaffey Hueytown Fire Department 201 Mabelon Court Hueytown, AL 35023</p>	<p>Municipal Employee Representative 744-2470 <a href="mailto:budgie491@charter.net">budgie491@charter.net</a> Replaces Chief Douglas McBee</p>

## 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) <a href="mailto:asmith@bainbridgemims.com">asmith@bainbridgemims.com</a>	Term Expires 2010
Place #2 Judge L. Kenneth Moore PO Box 396 Bessemer, Alabama 35201-0000	Associate 426-1111 425-1676 (Fax) <a href="mailto:wareaglelkm@gmail.com">wareaglelkm@gmail.com</a>	Term Expires 2009
Place #3 Ann Florie 4244 Caldwell Mill Road Birmingham, Alabama 35243	Associate (205) 969-1732 <a href="mailto:annflb@bellsouth.net">annflb@bellsouth.net</a>	Term Expires 2007*

\*Ms. Florie has been reappointed by Judge Linwood Smith for a six-year term effective November 1, 2007. 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.

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

Dr. Lita Clark resigned her position as Chair of the Three-Member Board effective May 11, 2007. Judge Linwood Smith appointed Alfred F. "Buddy" Smith, Jr. as Board Chair (Place #1) to replace Dr. Clark. Ann Florie was appointed to Place #3 by Judge Smith effective August 1, 2007, to fill the unexpired term of Rev. Tommy Hagler. Ms. Florie was reappointed by Judge Smith effective November 1, 2007, for an additional six-year term. Place # 2, occupied by L. Kenneth Moore, remained unchanged.

## **Three-Member Board Appeals**

The Three-Member Board has continued to actively review employee disciplinary appeals arising from decisions of hearing officers and other employee-related matters subject to a Board hearing. Since the November 2006 CSC meeting, the Three-Member Board has decided 46 disciplinary cases, 5 grievances, 6 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.

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 the report date,

Appointing Authorities have been invited to provide their comments and suggestions for modifications. Input will be sought through the Board's website, through emails to department heads throughout the Merit System, and through the Board's Merit Matters newsletter.

## **PBJC's Service Functions**

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

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

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

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

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

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

## Staffing Changes

### Employees Hired Since November 1, 2006

Peter Blank	Training Advisor
Tamara Brown	Data Management Technician
Alberta Byers	Data Management Technician
Ashanti Edwards	Assessment & Development Specialist
Kim Kinder	Compensation Manager
Kristen Palkovich	Assessment & Development Specialist
Jerry Roethig	Webmaster
Keisha Wicks	Assessment & Development Specialist

### Employees Promoted Since November 1, 2006

Latonia Aigbogun	Records Management Specialist
Jeffrey Crenshaw	I/O Psychologist
William Curtis	Systems Analyst
Robert Groce	Network Administrator I
Sandra Jackson	Personnel Technician
Becky Lopez	Administrative Assistant III
Olukemi Niyiladipo	Business Systems Analyst

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

Helena Bewley	Training Advisor
Nathan Brewster	Assessment & Development Specialist
Ivy Brown	Records Management Specialist
Geoff Burcaw	Assessment & Development Specialist
Thomas Carnahan	Assessment & Development Specialist
Tim Dwyer	Webmaster
Winette George	Assessment & Development Specialist
Michael Lesser	Sr. Assessment & Development Specialist
Mary Preston	Training Advisor II
Andrew Price	Testing Intern
Genae Raines	Train/Career Development Assistant
Evelyn Ray	Training Inst Design Supervisor
Amanda Winger	Assessment & Development Specialist

# ADMINISTRATION

## Overview

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

Administration is responsible for:

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

## Activities and Accomplishments

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

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

As the human resources agency responsible for administering the civil service statutes in Jefferson County, the Personnel Board strives to conduct its operations in an exemplary manner, to be knowledgeable of and fully compliant with all governing statutory regulations, to provide professional development opportunities for our staff, to execute our responsibilities competently, and, at all times, to assure the utmost integrity of the Board's processes.

In 2006, during the administration of the Fire Lieutenant examination, the Personnel Board became aware of a security breach that compromised the validity of the test administration. Because integrity of the testing process is a principle on which the Board was and is not willing to compromise, the test was redeveloped and re-administered and a full investigation into the circumstances of the breach was launched.

The investigation in to the compromise of the 2006 Fire Lieutenant Promotional Examination has been closed. The outcome of the disciplinary charges is set out in the table below.

<b>CASE</b>	<b>DISPOSITION</b>
Barton, Jackie	Voluntary retirement, mooting discipline
Bennett, Jacqueline	Settlement: suspension with admission of guilt
Bradford, David S.	Disciplined—suspension
Crosby, Corey A.	Settlement: suspension with admission of guilt
Lane, Darryl T.	Settlement: suspension with admission of guilt
Mitchell, Ural T.	Disciplined—suspension
Mitchell, Vincent H.	Settlement: suspension with admission of guilt
Mosley, Fitzgerald	Disciplined—suspension
Pennington, Michael	Discipline dismissed
Pinder, Rodney A.	Disciplined—suspension
Smith, Mark E.	Disciplined—termination
Williams, Catina	Disciplined—suspension
Williams, Jr., Willie	Disciplined—suspension
Winborn, Jr., Arizona	Settlement: suspension with admission of guilt
Wright, Anntoinette	Settlement: suspension with admission of guilt
Young, Larry W., Sr.	Voluntary retirement, mooting discipline

In summary, a Battalion Chief and a Lieutenant voluntarily retired within days of the disciplinary charges being filed; six firefighters entered negotiated resolutions under which they admitted guilt and accepted disciplinary action; hearing officer decisions were issued with respect to the remaining eight employees, all but one of whom was disciplined.

The compromise to the system was extremely costly financially. However as a fundamental principle, the Personnel Board aggressively strives to provide a level playing field for all candidates for Merit System positions. Individuals who cheat the system cheat the public they purport to serve. The easiest thing for the Board to have done would have been to do nothing at all. While painful, what transpired clearly demonstrates how far the Board has come. The Board will not tolerate attempts to undermine fairness in access to jobs in the Merit System. Individuals who attempt to game the system will be punished.

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

The Information Technology staff stayed current with the latest technology developments in the industry by attending workshops and seminars relevant to their areas of expertise. During 2007, staff attended Lawson LSF9 training, SQL, Crystal Reporting, and Lawson Process Flow. In addition, they engaged in knowledge transfer sessions with a number the Board's IT vendors.

In April of 2007, Performance Measurement Department staff members attended the 22<sup>nd</sup> Annual Society for Industrial/Organizational Psychology (SIOP) Conference. Additionally, the department has encouraged employee development through monthly continuing education meetings, outside training initiatives, and research, presentation, and publication opportunities.

Training staff attended the American Society for Training and Development Southern Regional Conference, the Society of Human Resource Management State Conference, the Association for Educational Communications and Technology conference, and the Instructional Design System conference held in Tuscaloosa.

The Board's Business Officer attended a two-day Strategic Planning and Budgeting workshop. Additionally, during the report period, Personnel Board staff attended training sessions on Workplace Safety conducted by a representative of the Sheriff's Department.

Early 2007 saw the beginning of a new management training course entitled Merit System Rules and Regulations. This class, offered quarterly and facilitated by the Board's General Counsel, is designed to assist supervisors when dealing with common rules and regulations issues in the Merit System.

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

The Board is committed to seeking ways to improve service level to its member jurisdictions. To this end, the agency implemented a number of initiatives during the report year to increase the efficiency of its operations.

The establishment of metrics by which to gauge service delivery has been an important focus of the agency. The Board's electronic systems capture data that is routinely provided to managers through a variety of web-accessed reports. Led by the Board's Data Management Department, a number of new reports were developed during the year allowing managers to view data at a summary level or drill down to view supporting detail. These reports provide "on demand" feedback valuable to measuring how efficiently and quickly work is being processed through the Board. Work processes and procedures are continually reviewed and adjusted accordingly. One such metric of particular importance is the time from receipt of a Request for Certification to issuance of a certification list. For the



year ending October 31, 2007, this time averaged .37 days where there was an active register in place.

Identifying new, better, and easier ways of doing business was also a continuing focus of the agency. The Board increased its use of electronic communications by expanding its IVR capability to provide test score information telephonically 24/7 and again used this functionality to communicate the results of the 2006-2007 Annual Classification Survey. Plans are underway to add out-bound dialing functionality providing the capability to actively transmit information to targeted populations.

Much of the Board's gains in efficiency focused on the use of web technology. Job Alert which electronically notifies applicants of the availability of jobs in which they have expressed interest has proved to be a significant addition to the Board's Jobs Quest site with tens of thousands of notifications issued each month.

New and more efficient test development methodologies were implemented during the year and work continued on a web-based Job Analysis Questionnaire (JAQ) intended to make subject matter expert participation in the JAQ process more convenient for jurisdictions and improve the efficiency of the data collection and analysis process.

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

Providing services to support the human resource needs of its member jurisdictions goes to the very core of the Board's purpose and, of the many services provided, none are of more importance or attention than the timely establishment of eligibility registers. This remains at the forefront of the Board's goals and mission. A significant accomplishment during the year was the release of 288 registers and the elimination of all backlogged requests awaiting establishment of registers. The Board is now able to address new requests in a timely manner, to be proactive with regard to the development of registers, and to focus on the routine replacement of registers in an effort to maintain current lists of eligible candidates to fill the hiring needs of the jurisdictions.

Likewise, the Board has recognized the constant need of the jurisdictions for law enforcement personnel. To accommodate this need and to be able to effectively compete in an increasingly competitive market, the Board has instituted a continuous application process for Police Officer and Deputy Sheriff that allows new applicants to be added to the register as soon as they become eligible. Additionally, all work has been completed to assure the availability of qualified candidates for promotion for all levels of law enforcement personnel. This means that jurisdictions will have readily available lists that contain the names highly qualified candidates for their vacancies.

Additionally, the Board responded to the jurisdictions' concern that some candidates might have convictions that would make them ineligible to serve in a law enforcement capacity. The Board researched the feasibility of performing pre-certification background investigations and following a meeting with the Police Chiefs in July it was the consensus that it would be duplicative and, therefore, not economical in terms of money or time. Further supporting the consensus was that the known incidences of candidates with felony convictions being referred were extremely low (2 in 2,254 candidates).

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

Recognizing that the Board is funded through assessments to its member jurisdictions and ultimately from the taxpayer monies, the Board is committed to being a conscientious steward of its resources. This includes assuring that there are sufficient internal operating policies and controls in place, that managers are sufficiently educated about managing their individual budgets, that all physical assets are inventoried and accounted for, and that the Board's financial practices are consistent with standard accounting principles and are in compliance with all federal, state, and local regulations, laws and statutes.

Recognizing that the agency's operations are funded by its member jurisdictions, the Board is equally committed to identifying and reducing unnecessary costs and to increasing the efficiency of its operations to the extent possible. Since the height of the receivership, the Board's budget has declined \$1.6 million and the FY2007-2008 budget represents the Board's third sequential declining budget.

The Board takes its commitment seriously and in support of this commitment, the Board conducted a budget workshop for its first line supervisors and managers in April, provided monthly financial statements to management staff throughout the year, and completed its annual inventory of physical assets. Because the Board has invested heavily in its electronic systems, the Board also conducted its annual audit of all Board desktop computers to assure compliance with the agency's policy against installation of unapproved or unlicensed software. Additionally, new policies were developed for cellular telephone usage, family and medical leave, and procurement card utilization. Other Board operating policies were updated and revised as necessary.

Leveraging the Board's technical infrastructure, a web-based training registration system was developed in-house by Board staff. This allowed the Board to discontinue paying substantial annual license fees to an external vendor for this functionality.

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

With over nine thousand Merit System employees and twenty-three separate jurisdictions, communicating with the Board's constituencies remains as one of the agency's most significant challenges. Since 2004, the Board has begun to rely more heavily on the web as a primary mechanism for assuring the availability of information. To accomplish this, the Board maintains two primary websites available to the public and an intranet site available only to Personnel Board employees. Visits to the two external sites, [www.pbjcal.org](http://www.pbjcal.org), the Board's main site, and [www.jobsquest.org](http://www.jobsquest.org), the Board's recruitment site, continue to be impressive and reflect that a growing number of individuals are utilizing the sites as resources for information about the Board and its operations. The intranet is used to assure the consistent communication of operating policies, procedures, and practices to all Board employees.

As a means of engaging Merit System employees directly, the Board is in the process of developing a new website as a vehicle of communication to share information and stimulate discussion about issues of common interest to employees of the system. The precursor to this site, Merit Matters, is an employee newsletter that is available both in hard copy and online and is published by the Board monthly.

During October, the Board began generating automatic email letters to all applicants and to all new Merit System employees. The applicant letter is intended to both thank the applicant for considering the Merit System as an employer and to fully explain the application, register creation, and certification processes. The new employee letter was designed to establish an early relationship with the employee and to share the various ways that the Personnel Board can be of assistance to them throughout their civil service careers.

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

The Board is aware of the concerns expressed by member jurisdictions about the cost of its operations. While the Board is pleased that these costs have significantly declined since the height of the receivership, it is evident that the costs cannot return to pre-receivership levels. In light of this reality, the Board is committed to providing services to the jurisdictions that both assure continued compliance with standards established under the Board's consent decree and are of added value to the jurisdictions in return for the dollars invested in the Board's operations.

To this end, the Board took a substantially more aggressive approach to competing for workplace talent and promoting the Merit System as an employer of choice than at any time in its history. Creative advertising and promotion

through a variety of media including print, radio, TV, and billboards, strategic branding of JobsQuest as an employment resource in Birmingham, direct marketing to target audiences, and targeted advertising campaigns for law enforcement and healthcare have resulted in attracting larger and more diverse applicant pools. With this more aggressive recruiting approach, combined with the availability of up-to-date registers and the continuous recruiting of law enforcement personnel, member jurisdictions should begin realizing immediate and substantial improvements in the quality and availability of applicants to fill their vacancies as well as in the Board's ability to respond timely to particular recruiting needs.

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

Development of the Board's training and development function is an important strategic approach to providing value added services to the jurisdictions. The Board offers a variety of training courses in both technical (computer) and non-technical areas. Courses offered by the Board are determined through surveys of jurisdiction personnel across the system to assure that the training meets identified needs. On October 10<sup>th</sup>, the Board recognized the graduation of twenty-three individuals from its Supervisory Certificate Program, a program that required the successful completion of fifteen training courses designed specifically for supervisors and managers in the Merit System.

Finding ways of assisting our member jurisdictions with their specific human resource needs remains an important goal. During the report year, the Board provided specialized training to several jurisdictions at their request. On-site and need-specific training is available to all Merit System jurisdictions and augments the agency's regular classroom training curricula. Additionally, recognizing that the System's healthcare organizations face market realities unlike many other Merit System organizations, regular meetings continued with Cooper Green Hospital and Jefferson Rehabilitation and Health Center to address these organizations' unique needs.

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

As a means of reaching out to all constituencies, the Board increased its emphasis on diversity and inclusion in its recruiting materials, including both print

and video/audio media. The Board targeted diversity markets for recruitment and offered instructional programs that encourage minority and female group members to apply for Merit System jobs. Additionally, the Board has established a working relationship with the Alabama Department of Rehabilitation Services (ADRS) to include people with disabilities as part of the Board's market audience.

Good corporate citizenship and involvement in professional, civic, and charitable activities are particularly encouraged as ways for the Board to make its presence known in the community. There was broad Board participation in a major fundraising effort for the Susan G. Komen Breast Cancer Race for Cure 5K Run/Walk. Through extensive efforts on the part of the staff over \$3,500 was raised.

The Board was represented on the Executive Council of the Alabama Business Leadership Employment (ABLE) Network by Roger McCullough and Guy Dewees. The ABLE Network is a consortium of businesses throughout Alabama that support the hiring and advancement of people with disabilities. Roger McCullough serves on the state Board for the Alabama Department of Rehabilitation Services representing business and industry and Charles Williams was appointed by Governor Bob Riley to serve on "The Bridge Group", a body of Afro-American clergy who develop strategies and initiatives relevant to Black communities across the state. In addition, many Board staff members are actively involved in community affairs on an individual level.

In April and again in July, the Board sponsored Link to Civil Service, an event to educate the community about the process of entering the Merit System, including the application process. The event included hands-on computer training and instruction in completing the electronic application. This event is scheduled to be held several times each year.

Participation in professional organizations is an important means by which Board staff stay current in their respective fields as well as a means of promoting the Board in the business community through networking with professional colleagues. Board staff participated in professional organizations including the Society for Human Resource Management (SHRM), the American Society for Training and Development (ASTD), and the Society for Industrial/Organizational Psychology (SIOP). Performance Measurement staff submitted research presentations for the 2008 SIOP Annual Conference. This staff has also submitted a nomination of the Board's test development processes and assessment center facility for the EEOC 2007 Freedom to Compete Award. A case study detailing the development of the Board's technology infrastructure was recently published in *Human Resource Management: Contemporary Issues, Challenges, and Opportunities*.

## **Future Plans**

The following are Administration's future plans:

- Continue to serve the citizens of Jefferson County, Bessemer, Birmingham, Center Point, Fairfield, Fultondale, Gardendale, Graysville, Homewood, Hueytown, Irondale, Leeds, Midfield, Mountain Brook, Pleasant Grove, Tarrant, Trussville, Vestavia Hills and Warrior by ensuring that the filling of local government jobs is based on merit and ability, and not based on political factors, nepotism, or favoritism.
- Continue to serve as conscientious stewards of public resources and ensure the efficient utilization of all resources provided to fund critical initiatives such as recruiting, employee testing, training and development and the overall management of the data and records systems for our 9,000 plus Merit System employees.
- Develop and institute initiatives to rebuild the image of the Board and foster stronger relationships with employees, departments, and Appointing Authorities.
- Pursue grant funding opportunities to help meet the needs of the jurisdictions we serve.

## **Conclusion**

The Board continues to realize successes and progress toward its established goals.

- The backlog of jobs with no active registers has been eliminated. This allows the Board to concentrate on new jobs for which registers need to be created and to create new and replacement registers much faster and according to a defined schedule.
- The Board implemented continuous testing for Police Officer. This allows the Police Officer register to be refreshed monthly, assuring a continuous source of new candidates to fill member jurisdictions' vacancies.
- The Board realized its goal to reduce the length of time to issue certification lists to less than one day. The average turnaround time for the past twelve months has been less than one-half day.
- The Board continued to see an expansion of visits to its websites. The increase in overall visits is the a result of continued targeted marketing and recruiting campaigns to brand JobsQuest as a widely recognized jobs resource site in the Birmingham Metropolitan Area and the Merit System as an employer of choice in Jefferson County.
- The Board's broad-based recruitment efforts, enhanced recruitment website, and targeted marketing campaigns increased applicants per job announcement 39% over 2006, this at a time when the Birmingham Metropolitan Area and the State of Alabama are experiencing historically low rates of unemployment.

- Job Alert was fully implemented. Job Alert is a feature of JobsQuest that electronically notifies applicants and prospective applicants of the availability of job opportunities in which they have expressed interest. Monthly email notifications have averaged 40,000. In the month of October Job Alerts reached 72,740.
- The Personnel Board continued to develop and implement internal policies and procedures to ensure integrity and accountability in the operation of the organization.
- CareerZone, an in-house training registration system was developed replacing Aspen, a vendor-licensed system. This has allowed the Board to realize a substantial ongoing annual cost savings.
- A number of new training initiatives have been implemented 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. The Board graduated its first Supervisory and Managerial Certification class in October, 2007.

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

## **FINANCIAL REPORT**

Table 1 below reflects the Board's expenditures for FY2006-2007. The Board is pleased to report that even with the unexpected expenses incurred as a result of the Firefighter investigation, the agency was able to end the fiscal year within budget. The Board is sensitive to the concerns of appointing authorities about the cost of the Board's operations during the years of the receivership and has worked diligently to create efficiencies and reduce expenses to the extent possible without compromising the integrity of the civil service system.

To this end, the Board has approved a budget for FY2007-2008 that represents a decrease from the Board's FY2006-2007 operating budget. This is the third declining budget since 2004 and is reflective of the Board's return to more normal operations as requirements under the long-standing consent decree are being achieved. Notably, as represented in Table 2 below, the Board's budget has decreased \$1.6 million since reaching a high in FY2003-2004. The Board remains committed to ensuring the efficient utilization of all resources under its control, to providing value-added services to member jurisdictions in a manner consistent with sound business practices and principles, and to operate in an open and transparent manner with our constituencies.



Table 1

**2006 – 2007 Personnel Board Expenses**

Salaries	4,040,707.34
FICA, Pension, Health, Life, Unemployment	1,049,202.15
Tuition Refund	4,080.00
Insurance Premiums	43,284.00
Legal	1,442,528.24
Other Professional Services (Special Master, Court-Appointed Monitor, Consultants, Transcription Services, etc).	233,186.63
Other Contractual Services (IT Hosting Application)	421,126.01
IT System Support (Licenses, Maintenance Service Contracts)	170,890.01
Rental Charges for External Test Administration	129,421.89
Office Equipment Rental & Repairs (printers, etc.)	2,482.46
Telephone Service, Cellular Phone Service & Data Lines	7,894.59
Postage & Express Mail	640.33
Advertising	215,019.73
Staff Development	36,492.05
Staff Mileage Reimbursement (travel to jurisdictions, etc.)	3,055.71
Reimbursement for Assessor Travel, Accommodations, & Per Diem-Dinner (assessors volunteer to serve as evaluators for the Testing Process)	135,016.84

Legislated Allowance	20,407.96
Books, Periodicals, Membership Dues & Subscriptions (on-line legal subscription, materials for Training classes, etc.)	15,344.51
General Office	27,836.08
Printing & Binding	524.70
Equipment Purchase/Lease (lease of copiers)	24,337.92
Other Technical Materials (computer software under \$1,000)	8,671.34
Hospitality (breakfast and lunch for assessors who volunteer from public agencies nationwide to serve as evaluators for the Testing Process)	35,011.21
Miscellaneous Equipment (computers)	16,257.75
Major Software	5,281.63
Jefferson County Data Processing, Archival, Motor Pool and Print Shop Charges	11,916.00
Jefferson County Square Footage	635,363.00
Total Expenditures*	<b><u>8,735,980.08</u></b>

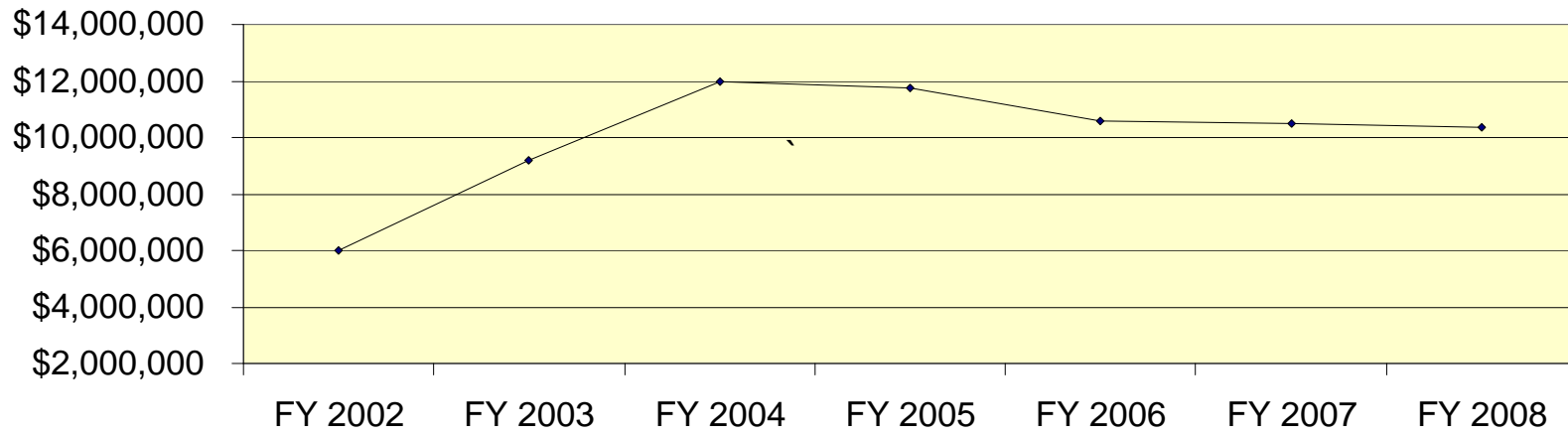
Personnel Board Encumbered Balance (outstanding purchase orders)\*

**1,046,847.24**

**\* Information was extracted from the Jefferson County SAP system (JCAL Budget Usage Report as of September 28, 2007). However, end of year accruals and adjustments have not been made yet by Jefferson County. Final expenditures, including adjustments and accruals, will be submitted to the Personnel Board in January, and reviewed and certified by the Personnel Director in the second quarter of 2008.**

Table 2

**Personnel Board of Jefferson County  
Approved Billable Expenditures/Final Budget  
Fiscal Years 2002 - 2008**



## **WORKFORCE DEVELOPMENT & APPLICANT SERVICES**

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

Workforce Development & Applicant Services has eight (8) FTEs – three Administrative Assistants; a Recruiting Advisor; two Recruiting Representatives; an Administrative Specialist and a Manager.

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

The 2007 recruiting campaign has attracted 2,524 applicants of October 31, 2007. 2,310 applicants have been invited for testing; 915 applicants have attended test administrations; 746 have passed the test and have been placed on the current register.

The 2006 recruiting campaign attracted 1,477 applicants. 1,410 applicants were invited for testing; 864 applicants attended test administrations; 716 passed the test and were placed on the register.

(The Police Officer/Deputy Sheriff position is now open continuous accepting applications year-round with monthly test administrations.)

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

The 2007/2008 recruiting campaign was in-process during the reporting period with advertising and marketing through newsprint, radio, television, billboards, internet postings and banners, electronic notifications, US Mail notifications, community outreach programs, and career events. The campaign has attracted 1,179 applicants as of October 31, 2007. The current campaign will continue through November 3, 2007.

The 2006/2007 recruiting campaign attracted 1,455 applicants. The resulting register contains 344 applicants.

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

The current recruiting campaign will continue through December 31, 2007. Registers for LPN and Staff Nurse contain 224 applicants as of October 31, 2007.

2006 Registers for LPN and Staff Nurse Total 139 applicants.

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

The current campaign will continue through December 31, 2007. As of October 31, 119 Hispanic applicants have applied for various positions.

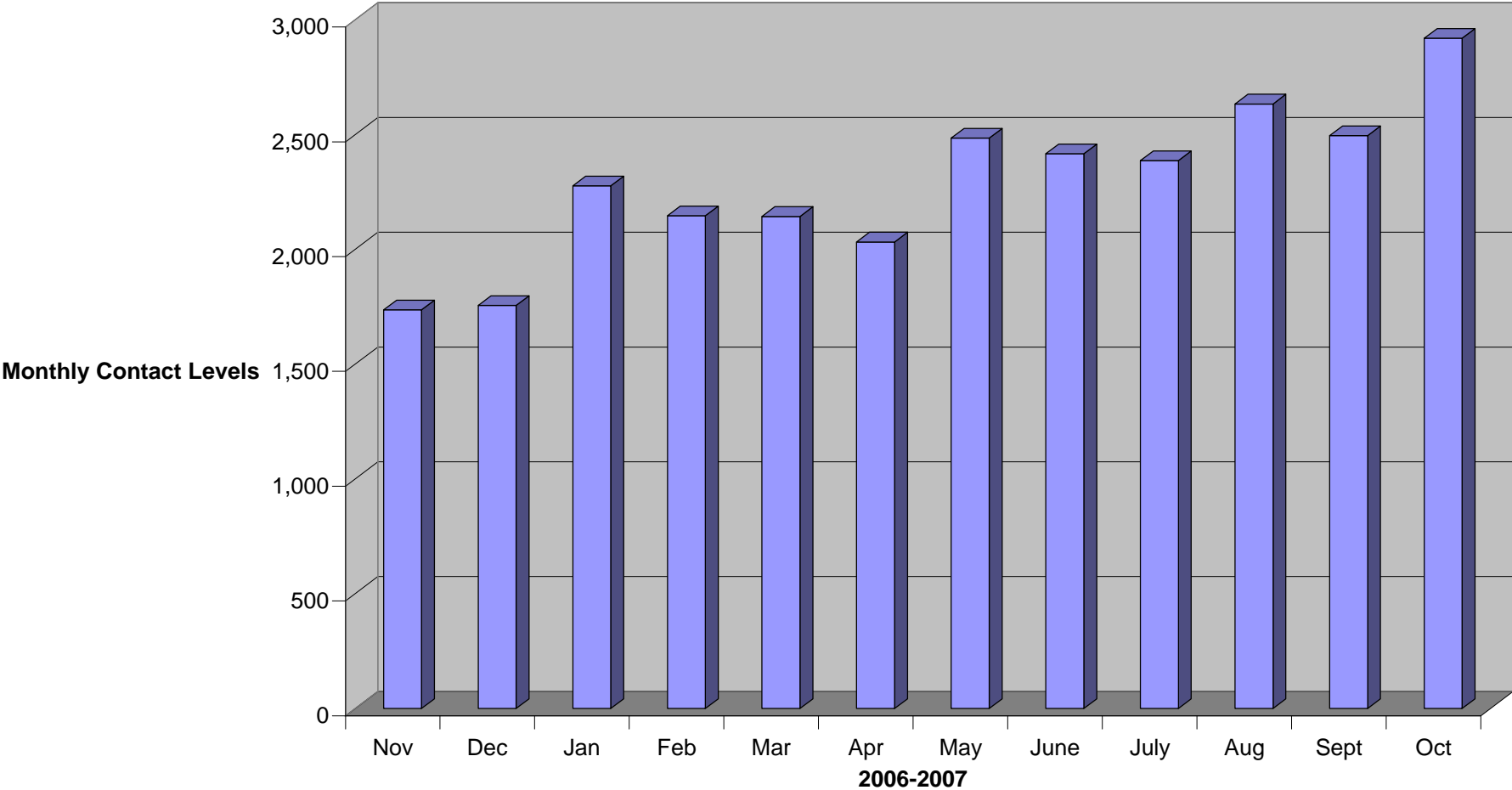
The 2006 recruiting campaign attracted 112 Hispanic applicants.

## **Applicant Services**

The Applicant Services staff is usually the first contact with the Personnel Board that most individuals experience. Therefore it is critically important that this first impression is positive. The staff field questions for every department at the Personnel Board as well as many that are not Personnel Board-related. In the past twelve months, the staff managed over 27,000 contacts. They are ready to answer or find someone who can answer the many questions they receive. The staff is also responsible for scanning and attaching supplemental documents such as transcripts, resumes, certificates and licenses to applicants' online applications.

The table and chart below provide total monthly customer contact activities and trends from November 1, 2006 through October 31, 2007:

### Customer Contact Activities



### Customer Contact Activities

Activity	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Total
Computer Kiosk Users	123	119	318	231	242	224	271	287	247	177	242	386	2,867
On-site/Remote Online Users Assisted	83	56	239	179	129	137	203	224	221	83	168	254	1,976
General PBJC Inquiries	1,105	1,190	1,144	1,286	1,304	1,206	1,422	1,290	1,415	1,693	1,429	1,643	16,127
Non PBJC Inquiries	79	122	118	121	136	115	165	129	132	131	113	118	1,479
Transfers/Referrals to PBJC Departments	149	82	255	150	163	160	267	340	213	341	365	343	2,828
IVR Files Processed	47	36	52	20	12	17	17	4	7	5	5	10	232
Emails Processed	150	150	150	159	157	173	139	142	151	203	173	165	1,912
<b>Total Monthly Volume</b>	<b>1,736</b>	<b>1,755</b>	<b>2,276</b>	<b>2,146</b>	<b>2,143</b>	<b>2,032</b>	<b>2,484</b>	<b>2,416</b>	<b>2,386</b>	<b>2,633</b>	<b>2,495</b>	<b>2,919</b>	<b>27,421</b>

## Recruiting

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

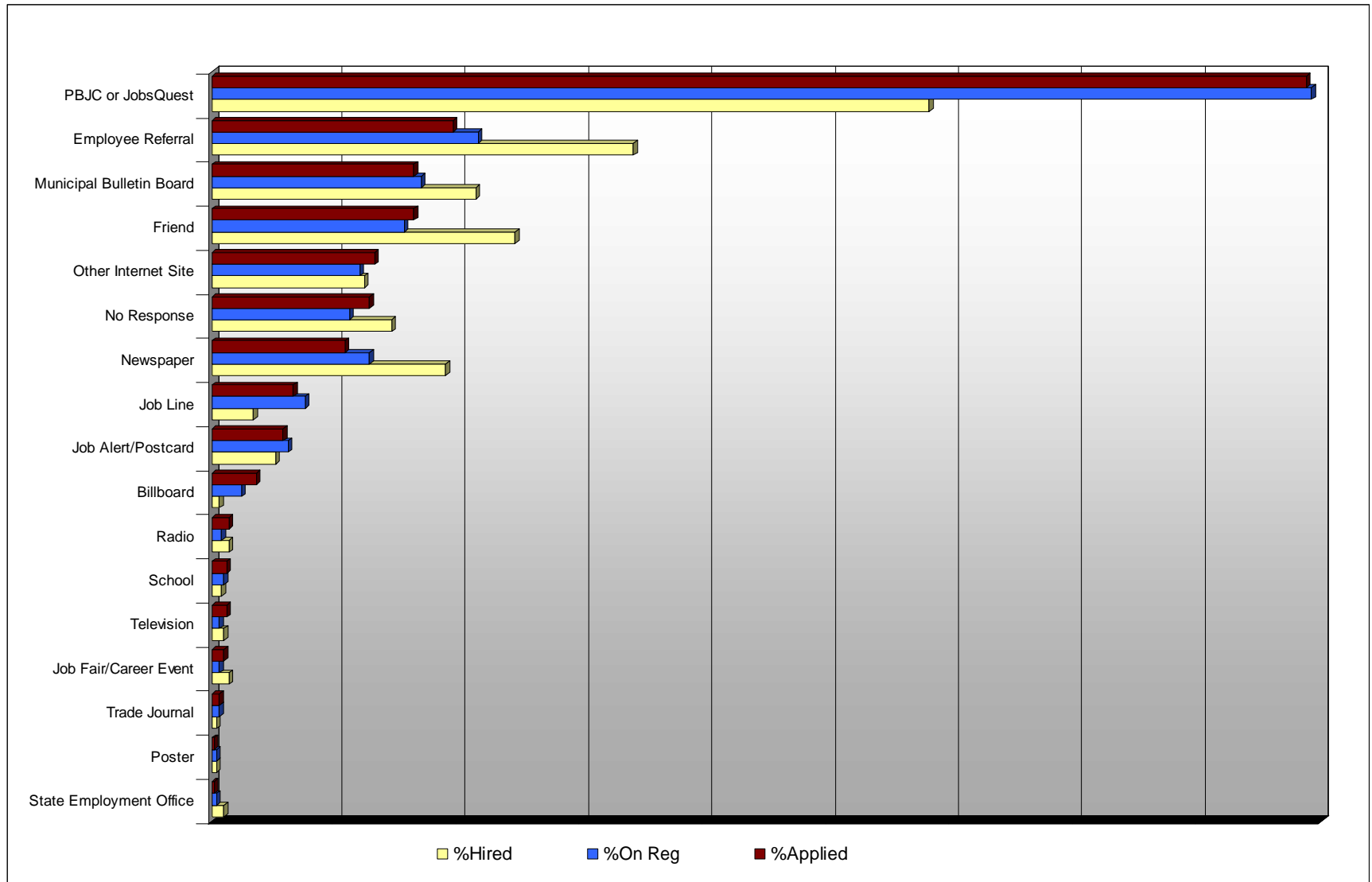
Recruiting for such a wide variety of positions requires a comprehensive strategy to meet the needs of the jurisdictions and to ensure a diverse and qualified pool of applicants. The recruiting staff works to establish, build, and maintain positive relationships with hiring authorities, community leaders,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

The table below and chart on the following page show a summary and totals for sources for applications, hires, and applicants placed on registers from November 1, 2006 through October 31, 2007.

<b>Answer</b>	<b>Applied</b>	<b>%</b>	<b>On Reg</b>	<b>%</b>	<b>Hired</b>	<b>%</b>
PBJC or JobsQuest Website	10,397	44.37%	4,447	44.65%	384	29.07%
Employee Referral	2,304	9.83%	1,076	10.80%	226	17.11%
Department/Municipal Bulletin Board	1,932	8.20%	842	8.45%	141	10.67%
Friend	1,924	8.21%	776	7.79%	162	12.26%
Other Internet Site	1,535	6.55%	601	6.03%	82	6.21%
No Response	1,493	6.37%	553	5.55%	97	7.34%
Newspaper	1,273	5.43%	642	6.45%	126	9.54%
Job Line	776	3.31%	379	3.81%	23	1.74%
Job Alert/Postcard Notification	680	2.90%	310	3.11%	35	2.65%
Billboard	430	1.83%	115	1.15%	4	0.30%
Radio	168	0.72%	40	0.40%	9	0.68%
School (Instructor/Professor/Counselor)	152	0.65%	54	0.54%	5	0.38%
Television	140	0.60%	29	0.29%	6	0.45%
Job Fair/Career Event	114	0.49%	34	0.34%	9	0.68%
Professional Newsletter/Publication	74	0.32%	28	0.28%	2	0.15%
Poster	27	0.12%	16	0.16%	3	0.23%
State Employment Office	16	0.07%	18	0.18%	7	0.53%
	23,435	100%	9,960	100%	1,321	100%



## 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. To fulfill this responsibility the Performance Measurement Division conducts thorough job analyses for all Merit System job classes, which serve as the basis for developing valid, effective, and legally defensible selection systems. To ensure that the job analyses identify all important aspects of the Merit System jobs, this division relies heavily on the incumbents and supervisors within the system to provide significant input into the work activities they perform in their jobs and what characteristics (i.e., knowledge, skills, and abilities) a person must possess to perform successfully in the job.

Once a Merit System job is clearly defined through the job analysis, the Performance Measurement Division develops custom selection procedures designed to measure the important knowledge, skills, and abilities (KSAs) a person needs to perform well on the job. The PBJC selects the types of selection procedures to use for a job based on two primary principles: (1) the ability of the procedure to accurately assess an applicant's KSAs and to predict an applicant's performance on the job, and (2) the extent to which the measure can predict performance of job applicants in a fair and unbiased manner. Obviously, the ideal situation is to utilize selection procedures that are highly predictive of performance on the job and unbiased toward applicants from different demographic groups. To accomplish this, the Performance Measurement Division utilizes high fidelity selection procedures such as work samples, structured interviews, and job simulations. The Performance Measurement Division strives continuously to develop better and more cost efficient examinations by leveraging available technology, particularly the PBJC's second floor testing facility.

After administering these types of examinations, the Performance Measurement Division must evaluate the candidates' performances or responses to the examination questions or scenarios. Through extensive work and recruitment efforts, the PBJC has been able to effectively identify and recruit subject matter experts (i.e., individuals knowledgeable of the jobs and/or assessment processes) to assist the PBJC, free of charge, evaluating candidate performance. These individuals participate in a day long training program and then spend up to 40 additional hours evaluating candidates for employment within the Merit System.

The final step in the examination process is the statistical evaluation of the examination components and the calculation of final candidate scores. Performance Measurement staff members follow strict data entry and management procedures to maintain the highest level of integrity of the data and candidate scores. Examinations are evaluated to ensure appropriate functioning of the test items and candidates' ratings on the various selection procedures are mathematically combined to form a final score upon which candidates are ranked and placed on the register. After scores are calculated, the applicants are informed of their scores via mail and afforded an appeal period during which they may submit an appeal of their score, should they deem such action necessary.

All of the above procedures are completed with adherence to all applicable employment laws and professional standards. All procedures and activities involved in the job analysis, test development, and administration and assessment processes are documented in writing in the form of a validation report.

The following sections will outline the major activities and accomplishments of Performance Measurement during 2007.

## **Staffing**

The Performance Measurement Division currently consists of 30 full-time employees and one part-time employee occupying seven positions. These positions include Industrial-Organizational Psychologist, Senior Assessment & Development Specialist, Assessment & Development Specialist, Web Survey & Multimedia Developer, Data Management Technician, Administrative Assistant III, and Administrative Assistant I.

During the period covered by the 2007 Annual Report, the Performance Measurement Division has experienced turnover of a number of individuals in several positions:

- Andrew Price (Intern) completed his six-month internship in December, 2006.
- Amanda Winger (Assessment & Development Specialist) resigned from the PBJC in January, 2007 to accept a job with a public safety testing consulting firm in Chicago, Illinois.
- Thomas Carnahan (Assessment & Development Specialist) resigned from the PBJC in May, 2007 to accept a job with a public safety selection consulting firm in Denver, Colorado.
- Geoff Burcaw (Assessment & Development Specialist) tendered his resignation in June, 2007 to accept an offer for employment with selection consulting firm in Sacramento, CA.
- Winette George (Assessment & Development Specialist) resigned from the PBJC in June of 2007 to return to her home in Trinidad.

- Michael Lesser (Senior Assessment & Development Specialist) separated from employment with the Personnel Board in June, 2007. Michael accepted an offer for employment with Home Depot in Atlanta, GA.
- Nathan Brewster (Assessment & Development Specialist) resigned from the PBJC in July, 2007. Nathan accepted an offer of employment with FedEx in the position of Senior Industrial & Organizational Psychologist.

Of the five Assessment & Development Specialist positions vacated in 2006, a total of three were filled. Of the remaining two vacant Assessment & Development Specialist positions, one was converted to a Data Management Technician, while the remaining position was cut from the Performance Measurement Division. Short bios are provided on the individuals hired to fill these positions are provided below:

- Tamela Parrish was hired as a Data Management Technician in May, 2007. Tamela has an Associates Degree in Computer Science from Lawson State University and a Bachelor of Science in Management Information Systems from the University of Alabama at Birmingham. Her prior work experience includes, among others, positions as a Technical Support Specialist at BellSouth and as a Data Specialist with Vesta Insurance Corporation.
- Kristen Palkovich was hired as an Assessment & Development Specialist and started with the Personnel Board of Jefferson County on September 17, 2007. She has a B.A. in Psychology from Gannon University and an M.A. in Industrial & Organizational Psychology from the University of West Florida. Her experience includes work as a Personnel Psychologist for the Naval Education and Training Center and as an Executive Recruiter with Global Recruiters Network.
- Keisha Wicks was hired as an Assessment & Development Specialist and began employment at the PBJC on October 1, 2007. Keisha has a B.S. in Psychology from Louisiana State University, an M.S. in Industrial & Organizational Psychology from the University of Tennessee at Chattanooga, and is currently working to complete her dissertation as fulfillment of the final requirement for her Ph.D. at the University of Central Florida. Her work experience includes research and teaching at the University of Central Florida.
- Ashanti Edwards was hired as an Assessment & Development Specialist and started work at the PBJC on October 15, 2007. Ashanti earned a B.A. in Psychology and Social Work from Florida A&M University, and she is currently working to complete her dissertation as fulfillment of the final requirement for her Ph.D. in Industrial & Organizational Psychology from Clemson University. Her work experience includes survey work with TIAA-CREF and research and teaching at Clemson University.

The Senior Assessment Development Specialist position vacated by Michael Lesser was not filled and was cut from the Performance Measurement Division. In order to accommodate the staffing changes and the reduced number of

positions, the five job analysis/test development teams were condensed to four teams.

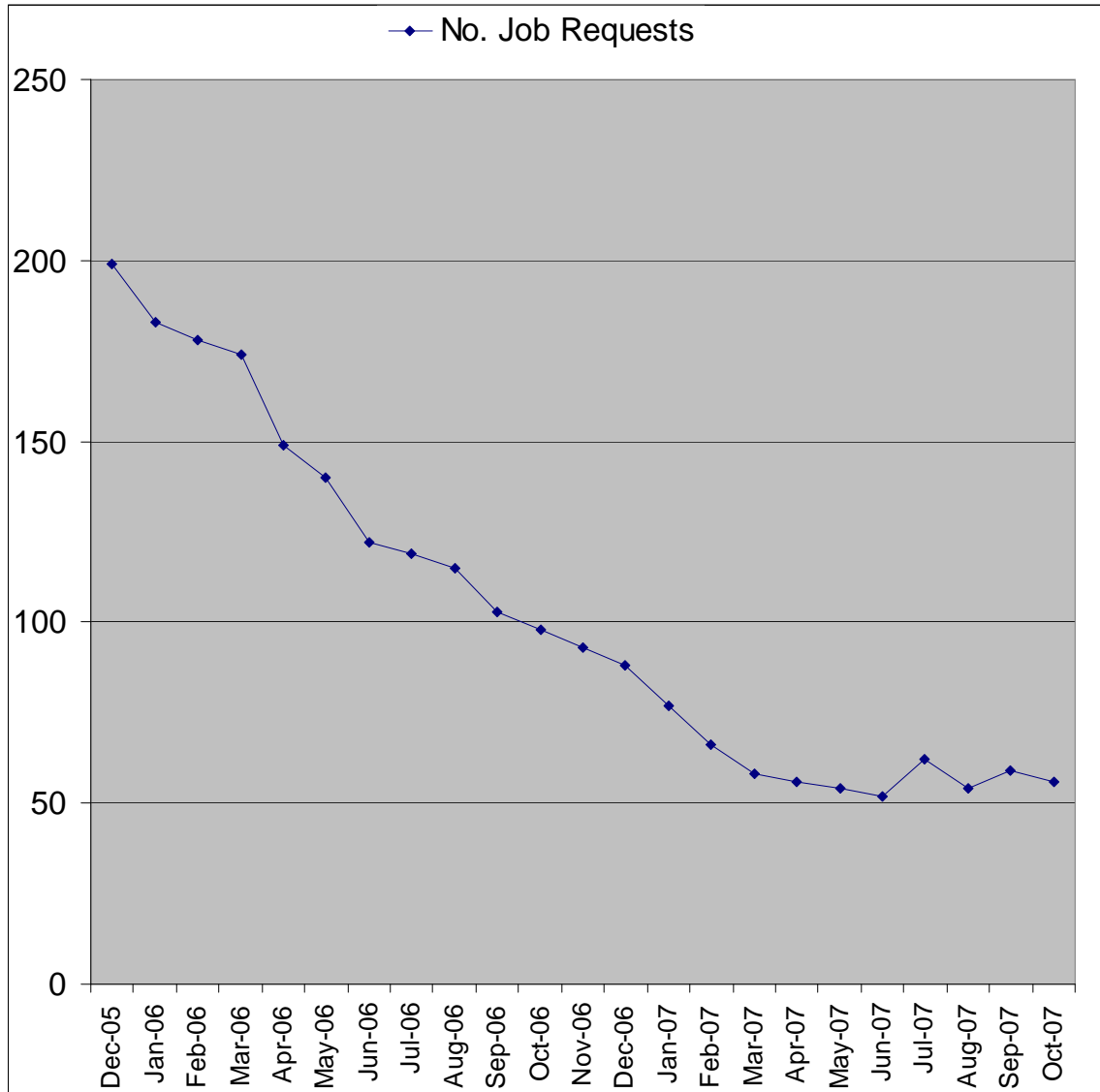
## **Activities & Accomplishments**

### *Elimination of the “Backlog”*

As outlined in the Performance Measurement Division overview, the primary responsibility of this division is the administration of selection tests for the purpose of establishing eligible registers from which jurisdiction may hire classified employees. The PBJC strives to fulfill this responsibility in a timely and competent manner; however, due to the time that was required to address the consent decree and establish effective and legally defensible job analysis and testing procedures under the federal receivership, delays were experienced in the release of registers. During that time a “backlog” of jobs for which eligible registers were needed was encountered. At its height, the backlog of work consisted of over 200 jobs in need of eligible registers. Coming into the 2007 calendar year, the Performance Measurement Division’s primary goal was the elimination of the backlog of work and the timely establishment of eligible registers. As of April of 2007, the PBJC effectively eliminated the backlog of jobs in need of eligible registers. Since that time, the PBJC has been able to begin to address the needs of the jurisdictions as soon as a request for certification was submitted. Since that time the PBJC has continued to reduce the time required to produce eligible registers. The figure below presents a line graph tracking the total number of requests for certification lists for jobs in which no (or an inadequate) eligible register exists (i.e., requests in “Testing Review”). As can be seen from the chart, there are still a number of jobs (currently 56) that have a certification request in testing review. All of these jobs are currently being actively worked on by Performance Measurement staff. Below is a breakdown of the status of each of those requests:

- Ten of the requests are for jobs that have active registers in place; however, additional applications are being accepted in order to supply a sufficient number of applications to consider for vacant positions.
- Five have been announced and applications have been screened. These jobs are currently in the 10 day appeal period and the register will be released at the conclusion of this period.
- Eleven are currently announced and applications are being accepted.
- Two are in the test scoring stage of the register establishment process.
- Four are in the test development stage of the register establishment process.
- Twenty-four are in the job analysis stage of the register establishment process.

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



Because there are always openings occurring in Merit System jobs (either through attrition or newly created positions), the chart above will never reach zero. Since May, there have been on average 30 new requests submitted for testing review each month. Therefore, now that the backlog is complete, it is anticipated that the number of jobs in testing review will range between 40 and 60 for any given month. The goal of the Performance Measurement Division is to be able to address these requests by posting the jobs for which the requests are submitted immediately upon receipt of the request. To achieve this goal, up to date job analyses and minimum qualifications are needed for all Merit System jobs. To adhere to professional standards, a job analysis must be completed on a job every five years. Currently, the PBJC has up to date job analyses and minimum qualifications on approximately 70% of Merit System 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 currently working on a significant number of jobs for which no request for certification is in place.

*Eligible Registers Established*

Included in, and in addition to, the work involved in the elimination of the backlog, the Performance Measurement Division has completed a significant amount of work in the job analysis, test development, and register establishment processes. The following are highlights of the work performed by this division during 2007:

- Over 80 test exercises have been developed and administered during the 2007 fiscal year.
- Over 8500 candidates have attended and completed tests administered by the Performance Measurement Division during this time period.
- Job analyses have been conducted and completed for over 150 jobs.
- Eligible registers were established and released for 288 jobs since November 1, 2007. A list of these registers is presented in Table1 below.

**Table 1. Registers Established from 11.1.06 through 10.31.2007**

Job Code	Register Title	Job Code	Register Title
43	Medical Transcriber	5436	Sewer Service Supervisor
44	Medical Clerk	5454	Sanitation & Ordinance Inspector
60	Office Assistant	5457	Environmental Code Enforcement Supervisor
63	Administrative Assistant I	5459	Environmental Code Enforcement Manager
64	Administrative Assistant Ii	6031	Police Officer/Deputy Sheriff
66	Administrative Assistant Iii	6355	Deputy Coroner
68	Administrative Assistant Iv	6357	Chief Deputy Coroner
69	Administrative Coordinator	6421	Parking Enforcement Officer
115	Legal Secretary	6423	Senior Parking Enforcement Officer
274	Senior Court Clerk	6463	Fingerprint Classifier
275	Principal Court Clerk	6467	Latent Fingerprint Examiner
277	Chief Court Clerk	6469	Senior Latent Fingerprint Examiner
278	Probate Court Coordinator	6470	Latent Fingerprint Examiner Supervisor
321	Business Office Supervisor (Non-Medical) - Bessemer	6474	Investigator-Checks & Warrants
453	Accounting Assistant I	6490	Corrections Officer
455	Accounting Assistant Ii	6494	Senior Corrections Supervisor
642	Communications Operator I	6551	Security Officer
652	Public Safety Dispatcher Ii	6553	Senior Security Officer
756	Senior Printer	7000	Patient Care Technician
833	Senior Auto Parts Clerk	7003	Surgical Technician
856	Purchasing Agent - Health Department	7023	Central Supply & Materials Supervisor
873	Buyer	7033	Clinical Nurse Practitioner
875	Senior Buyer	7036	Case Manager, R.N.
875	Senior Buyer-Birmingham	7041	Minimum Data Set Coordinator
880	Principal Buyer	7064	Admissions Coordinator - R.N.

Job Code	Register Title	Job Code	Register Title
1005	Senior Auditor	7066	Occupational Health Nurse
1007	Principal Auditor	7071	Nursing Assistant
1015	Payroll Specialist	7073	Licensed Practical Nurse
1023	Accountant	7075	Staff Nurse
1025	Senior Accountant	7076	Nurse Manager
1026	Construction Accountant	7079	Charge Nurse
1028	Chief Accountant	7082	School Health Nurse
1029	Cash & Investment Manager	7084	Public Health Nurse
1037	Budget Officer	7091	Flexipool Staff Nurse
1057	Risk Manager	7092	LPN - Flexipool
1073	Business Manager (Non-Medical)	7095	Staff Nurse - Baylor
1073	Business Manager (Medical)	7096	LPN - Baylor
2067	Administrative Services Manager	7112	Cardiac Monitor Technician
2083	Administrative Analyst	7143	Biomedical Technician
2085	Senior Administrative Analyst	7183	Diagnostic Imaging Technician (Radiographer)
2087	Principal Administrative Analyst	7183	Diagnostic Imaging Technician (Nm)
2090	Education/Training Coordinator	7183	Diagnostic Imaging Technologist (Ultrasound)
2095	Public Relations Coordinator	7184	Special Imaging Technologist
2243	Juvenile Detention Officer	7193	Medical Laboratory Technician
2384	Social Worker	7195	Medical Technologist Shift Supervisor
2388	Social Services Coordinator	7196	Medical Technologist Supervisor
2390	Mental Health Coordinator-Probate Court	7198	Medical Laboratory Coordinator
2482	Attorney	7243	Respiratory Therapist
2513	Computer Operator li	7253	Occupational Therapist
2535	Data Entry Supervisor	7271	Physical Therapist Assistant
2542	Webmaster	7273	Physical Therapist
2551	Systems Administrator I (Jefferson County)	7349	Public Health Language Worker
2552	Network Systems Administrator li	7353	Environmental Chemist
2557	Programmer Analyst (GIS)	7363	Disease Intervention Specialist
2569	Data Management Technician	7365	Disease Intervention Program Supervisor
2570	Geographic Information Systems Technician I	7373	Environmental Health Specialist
2575	Geographic Information Systems Specialist	7375	Environmental Health Program Sprvsr (Air Pollution)
2577	Geographic Information Systems DB Supervisor	7377	Environmental Health Program Manager (CEP)
2582	Deputy Chief Information Officer	7377	Environmental Health Program Manager (Air)
2583	Systems Analyst (Multi-Platform) Jefferson County	7401	Dental Assistant
2583	Systems Analyst (Open Systems)	7403	Dental Hygienist
2583	Systems Analyst (Multi-Platform)	7407	Principal Dental Hygienist
2584	Senior Systems Analyst (Multi-Platform) Jefferson County/SWMA	7493	Clinical Dentist
2584	Senior Systems Analyst (Multi-Platform) Birmingham	7540	Patient Activity Leader
2584	Senior Systems Analyst - GIS	7544	Patient Activity Director
2651	Chief Personal Property Appraiser	7626	Health Services Project Administrator
2652	Personal Property Appraiser	7658	Director of Quality Improvement
2653	Property Appraiser	7677	Director of Hospital Education - CGH



<b>Job Code</b>	<b>Register Title</b>	<b>Job Code</b>	<b>Register Title</b>
2655	Senior Property Appraiser	7745	Nutrition Consultant
2730	Statistical Analyst	7746	Senior Nutrition Consultant
2733	Air Pollution Information Analyst	7747	Nutrition Services Coordinator
2829	Records Management Specialist	7850	Director of Customer Services & Health Plans
2830	Workforce Analyst	7853	Health Information Services Technician
2849	Training Advisor	7877	Deputy Director, Nursing Services - JRHC
2850	Personnel Technician	7879	Director, Jefferson Rehabilitation & Health Center
2853	Personnel Analyst I	7881	Administrator - Outpatient Care
2863	Assessment & Development Specialist	7903	Pharmacy Technician
2873	Assistant Occupational Health/Safety Administrator	7977	Clinical Pharmacist
2923	Housing Rehabilitation Specialist	7978	Pharmacy Manager
2966	Community Develop. Spec. -Housing Rehab.	8021	Herbicide Applicator
2966	Community Develop. Spec. -Community Projects	8031	Truck Driver
2971	Human Resource Planner	8032	Heavy Equipment Operator
2979	Chief Human Resource Planner	8033	Refuse Truck Driver
2981	Director of Economic Development	8034	Construction Equipment Operator
2991	Economic Development Analyst	8035	Brush & Trash Supervisor
2997	Economic & Community Develop. Director - BS	8062	Semi-Skilled Laborer
3075	Architect	8064	Labor Supervisor
3078	Chief Architect	8065	Construction Supervisor
3084	Planner	8067	Public Works Supervisor (Construction/Sanitation)
3086	Senior Planner	8068	Senior Construction Supervisor
3089	Principal Planner	8083	Bridge Maintenance Crewleader
3107	Civil Engineer	8085	Bridge Maintenance/Construction Supervisor
3109	Senior Civil Engineer	8111	Shop Helper
3111	Chief Civil Engineer	8135	Power Meter Technician
3112	Flood Plain Administrator	8152	Assistant Chief of Elections
3170	Deputy Director of Roads & Transportation	8153	Voting Machine Technician
3319	Traffic Sign Painter	8175	Tire Shop Supervisor
3321	Traffic Striping Machine Operator	8180	Maintenance Mechanical Supervisor
3323	Traffic Striping Machine Crewleader	8183	Small Engine Mechanic
3325	Traffic Maintenance Worker	8193	Automotive Technician-Car & Light Truck
3327	Traffic Signs & Markings Supervisor	8193	Automotive Technician-Heavy Truck
3349	Traffic Signal Supervisor	8193	Automotive Technician-Heavy Equipment
3486	Senior Engineering Inspector	8265	Arborist
3487	Principal Engineering Inspector-Surveyor	8267	Senior Arborist
3487	Principal Engineering Inspector-Inspection/Construction	8281	Green House Worker
3626	Senior Telecommunications Technician	8283	Green House Gardener
3673	Land Acquisition Agent	8287	Landscape Crew Leader
3674	County Property Manager	8333	Sewer Line Video Specialist
3675	Senior Land Acquisition Agent	8373	Closed Circuit TV Technician
3676	Chief Land Acquisition Agent	8393	WWTP Operator I
3712	Meteorologist	8423	Utility Meter Reader - Bessemer
3724	Soil Scientist	8451	Water Utility Service Helper - Irondale

Job Code	Register Title	Job Code	Register Title
3754	Public Health Engineer	8451	Water Utility Service Helper-Bessemer
3760	Air Pollution Instrumentation Technician	8453	Water Utility Service Worker - Bessemer
4125	Director, Senior Citizen Center - Irondale	8475	Water Distribution Supervisor
4161	Recreation Play Leader	8481	Power Distribution Helper
4162	Recreation Leader	8484	Electrical Distribution Assistant Supervisor
4163	Senior Recreation Leader	8485	Electrical Distribution Supervisor
4164	Recreation Center Director	8533	Carpenter
4165	Recreation Supervisor	8534	Cabinetmaker
4169	Exercise Physiologist(Part-Time)	8553	HVAC/Refrigeration Technician
4177	Fitness Center Director	8575	Painter Supervisor - Birmingham
4179	Fitness Center Administrator	8611	Guard
4319	Museum Technician	8623	Building Custodian
4321	Aircraft Museum Restoration Technician (Part-Time)	8625	Senior Building Custodian
4327	Exhibit Designer - Southern Museum of Flight	8633	Maintenance Repair Worker
4387	Museum Curator	8635	Senior Maintenance Repair Worker
5031	Firefighter	8648	Chief of Building Maintenance
5033	Fire Lieutenant	8687	Hospital Maintenance Superintendent
5034	Fire Captain	8697	Assistant Director of General Services
5038	Fire Battalion Chief I	8699	Director of General Services
5044	Fire Prevention Inspector Iii	8710	Public Works Assistant Director I
5050	Fire Prevention Inspector I	8713	Public Works Director I
5094	Deputy Fire Chief-Mountain Brook	8714	Public Works Director Ii
5094	Deputy Fire Chief-Vestavia Hills & Bessemer	8715	Public Works Director Iii
5151	Emergency Management Officer	8786	Assistant Highway District Superintendent
5246	Plumbing, Gas & Mechanical Inspector	8815	Cemetery Supervisor
5254	Building Inspector	8877	Bridge Superintendent
5255	Building Inspections Officer	9031	Food Service Assistant
5256	Building Inspection Superintendent I	9035	Cook
5257	Building Inspections Superintendent Ii	9055	Food Services Supervisor
5265	Plans Examiner	9093	Dietitian
5356	Zoning Supervisor	9133	Beautician
5359	Zoning Administrator	9179	Director of Housekeeping

### *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 has 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 new

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 still remain on the register for one year or until hired, whichever period is shorter. Progressing from annual to monthly testing will allow for more competitive recruitment efforts, save money, and better meet the critical public safety needs of the member jurisdictions. Additionally, it could potentially enhance candidate test performance and decrease the impact of candidate attrition. Overall, continuous testing will result in a fresher, more qualified pool of candidates that will better meet the hiring needs of the member jurisdictions. The benefits of this change are outlined below.

- Many government agencies recruit year-round for police officer or recruit when positions become vacant (the Merit System almost always has vacant positions), and out-of-state agencies are aggressively recruiting in Metro Birmingham. The open continuous process allows the PBJC to be equally aggressive in order to compete for talent in our area and beyond, and to attract the most qualified applicants for law enforcement.
- Historically, the PBJC rented space from the BJCC to administer the Police Officer test due to the large number of candidates. Testing more frequently allows testing to occur in PBJC's facilities due to the lower number of candidates tested at any given administration. In addition to rental fee savings, the use of PBJC's testing facilities will allow for increased test security and more efficient test administrations.
- Testing more frequently allows some candidates to perform at their maximum level. Causes of unreliability associated with the test-taker, such as being tired, stressed, or ill (Guion, 1998), can be reduced because, instead of being forced to attend the test during an inopportune time or wait until the next year to test, candidates could simply wait until the next month's administration.
- When testing annually, candidates had to take the test on the one or two days it is administered. Many candidates never arrive to take the test. In 2005, of the 1079 eligible candidates invited to the test, 543 (i.e., 50.3%) did not attend; in 2006, of the 1425 eligible candidates invited to the test, 566 (i.e., 39.7%) did not attend. In a survey administered to no-shows for the 2006 Firefighter exam, only 5.5% of respondents indicated they did not attend due to lost interest; the vast majority of no-shows were a result of conflicts or issues that prevented them from attending the test at that particular time. Testing more frequently provides candidates with more options and flexibility and could reduce negative attrition.

As mentioned, under this approach to recruiting and testing for Police Officers, new candidates will be added to the eligible register on a monthly basis. Additionally, existing candidates are hired off of the register. Because of these changes that occur to the register (i.e., adding new candidates and removing hired candidates), the candidates' ranks are dynamic. In an effort to ensure that candidates have access to needed information regarding their rank, the PBJC has implemented a function within its interactive voice response (IVR) system

that enables candidates to call 24 hours a day, seven days a week to obtain information on their rank in real-time. This phone number is provided to candidates in their initial score notice and they are encouraged to use this system to stay fully informed of their placement on the register.

During the 2007 recruiting period, 2,310 applicants have been invited to take the test for Police Officer/Deputy Sheriff. Of these invitees, 915 have attended the test administrations and 746 have passed the test and been placed on the current register. Note this number does not include any of the 51 October test takers, as these tests are currently being scored. The Performance Measurement Division has administered five monthly Police Officer/Deputy Sheriff testing sessions. The numbers of candidates tested by month are presented below:

- June tests – 469 candidates (includes tests administered in Birmingham, Tuscaloosa, and Atlanta)
- July test – 265 candidates
- August test – 79 candidates
- September test – 86 candidates
- October test – 51 candidates

#### Police Promotional Series

Since the 2006 Annual Report, the Performance Measurement Division developed examinations for Police/Sheriff Sergeant, Police/Sheriff Lieutenant, Police/Sheriff Captain, and Police Chief I, Police Chief II, and Police Chief III. The tests for these jobs were administered during the month of September, 2007. Assessment of these jobs occurred throughout the entire month of October. Scores were calculated and notices were mailed for Police Chief I, II, and III on October 22, 2007. The eligible registers for all three jobs were released on November 6, 2007. Test notices for the remaining jobs are anticipated in November and December, with registers being released following the 10-business day appeal period.

#### Firefighter

Over the past four years, the Performance Measurement Division has created new registers for entry-level Firefighter on an annual basis. At this time, unlike Police Officer/Deputy Sheriff, Firefighter remains a job that is tested on an annual basis. The rationale behind this decision is based primarily on 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. A new register was established for entry-level Firefighter on March 6, 2007 containing 344 eligible candidates. The Firefighter job was announced again on September 2, 2007 and recruitment has begun in order to establish a new register for 2008.

#### Fire Promotional Series

The Performance Measurement Division has developed a schedule of establishing eligible registers for the Fire promotional series every 18 months.

In order to accomplish this for Fire Lieutenant and Fire Captain, tests were administered in October of 2006. However, these tests were never assessed due to evidence of cheating on the exam. In an effort to rectify this situation, the PBJC modified its test development procedures for public safety jobs to include the utilization of external subject matter experts (i.e., individuals from outside the Merit System and the immediate geographic area) to develop the tests and internal subject matter experts for final review of the tests during the actual administration in order to further increase the security of the examination content.

After learning of the test security breach of the 2006 examinations, the Performance Measurement Division immediately began developing new examinations using the new procedures. These newly developed examinations were administered in March, 2007. Eligible registers were established for Fire Lieutenant and Fire Captain in May and June of 2007, respectively.

Work is currently beginning for the next promotional examinations for Fire Apparatus Operator, Fire Battalion Chief, and Fire Chief. Examinations for these jobs are scheduled to occur in March and April of 2008.

#### *Internal Communication and Information Sharing*

In order to provide the best possible service to member jurisdictions it is imperative that PBJC departments and staff communicate effectively and share information. Improving in these areas is a continuous goal for the Performance Measurement Division. Although this is a daily process and involves many routine activities and interactions among departments, a number of significant cross-departmental activities have occurred within the PBJC that have been designed to enhance the overall function of the Board.

Staff members from the Performance Measurement Division have been active in assisting in the development of a new website designed to enhance communication between the PBJC and Merit System employees. The site will be designed to better connect Merit System employees with the Personnel Board and to provide a forum for the exchange of ideas and information directly with the employee population. Performance Measurement staff have worked with individuals from many different department within the PBJC to identify key content areas and data collection efforts to ensure an effective and useful website.

The Performance Measurement Division has worked closely with the Records Management and Data Management Department to establish appropriate procedures for establishing Police Officer/Deputy Sheriff as an open continuous announcement within the existing structure of the various human resource management systems and PBJC Rules & Regulations. This collaborative process helped ensure a smooth and effective transition of the Police Officer announcement to open continuous.

Performance Measurement Division has worked with the Classification & Compensation Department to coordinate data collection needs for job analysis activities in order to combine some data collection efforts, reduce redundancy in work performed across departments, and more effectively share information across departments. Meetings were held between Performance Measurement staff and Classification & Compensation staff to ensure a clear understanding of the data needs of these departments and to identify a way in which the job analysis work performed by the Performance Measurement Division can gather information necessary for Classification & Compensation and to ensure effective transition of that information.

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

The Performance Measurement Division is finalizing the development and implementation of an electronic task and KSA collection, storing, and reporting system. Progress on completing this system has been delayed substantially the latter half of this year due to the heavy test development workload placed on the staff member developing this database; however, the database is expected to be completed by the end of December of 2007. Once complete, this system will allow for easier questionnaire development, more efficient administration of questionnaires to SMEs, and easily accessible reports for obtaining data on Merit System jobs. This system will greatly enhance the ability of the Performance Measurement Division to share job analysis information with Classification & Compensation, which will allow for greater consistency between classification specifications and job announcements and easier classification of positions.

#### *External Communication*

Developing effective relationships between the PBJC and its member jurisdictions is key to providing effective customer service. As such, the Performance Measurement Division maintains a constant focus on communication with Merit System jurisdictions, employees, and applicants in its day to day operations. Performance Measurement staff are encouraged to clearly communicate the needs of the department to individuals with whom they are working and the purpose of the processes in which external individuals participate. Performance Measurement staff are also encouraged to take advantage of opportunities to share information about the services of the PBJC to external individuals during routine work, such as job analysis focus group sessions. In addition to these daily activities, the Performance Measurement Division has undertaken other initiatives to help improve communication between

the PBJC and external stakeholders. A number of these initiatives are presented below.

The Performance Measurement Division has established liaisons for each jurisdiction in order to provide a point person for jurisdictions to communicate their hiring needs. The primary goals of these relationships are to ensure the PBJC is aware of the employment needs of the jurisdictions and to enhance the ability of the PBJC to meet these needs in a timely fashion. As these relationships grow, it is expected that staff members will better understand the needs of the jurisdictions and ensure that a point person is in place to communicate employment testing related issues to appropriate persons within the jurisdictions. Overall, it is expected that the liaisons will open lines of communication, serve as a means of updating the jurisdictions on the PBJC's progress toward greater efficiency and effectiveness of service, and to outline an appropriate manner for jurisdictions to provide advanced communication of anticipated employment needs.

PBJC has identified and set for purchase mailing equipment that will greatly improve the amount of information that can be communicated to external individuals (e.g., applicants, Merit System employees) in general mailings. Each year, the Performance Measurement Division sends tens of thousands of "notices" to candidates through the mail informing them of their application status, inviting them to test administrations, and providing test scores and ranks on the registers. Currently, the amount of information that can be provided to candidates is greatly limited due to the supplies and equipment used to generate and mail these notices. The purchase of the new forms and equipment will provide substantially more space for providing information to candidates, leading to better and more thorough communication. Additionally, the new equipment will increase the efficiency of the mailing process by over 1000%. This will make more frequent notification a viable option for communicating information to external individuals.

#### *Enhancing Job Analysis and Test Development Procedures*

In order to more efficiently and effectively study jobs for purposes of developing valid, fair, and legally defensible selection procedures, the Performance Measurement Division is constantly seeking ways to create more efficient and effective work procedures, while still adhering to all legal guidelines and professional standards. Since the time of the 2006 annual report, the Performance Measurement Division has developed new procedures for test development for public safety positions and job analysis procedures for all Merit System jobs.

New job analysis procedures have been developed for studying jobs using a job family approach. This means that groups of related jobs will be analyzed at the same time to create a more efficient and effective data collection process. The expected benefits of the new procedures are outlined below:

- Increase in 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.
- Greater consistency in the job analysis information and minimum qualifications obtained/developed for related jobs.
- Easier and more effective identification of promotional patterns among related jobs.
- Greater identification of any issues with the classification of positions or identification of positions being worked out of class.
- A more efficient and cost effective selection process by identifying common selection requirements across related jobs.

The process of establishing procedures has involved the testing of new procedures, revising to those procedures to address any unanticipated problems or issues, training of the Performance Measurement staff on the procedures, and sharing the details of the process with the jurisdictions. The PBJC is near the completion of conducting job analyses for all jobs within one job family using this approach. The Performance Measurement Division has identified 20% of job classes within a number of job families that will be the focus of job family based job analysis efforts for 2008.

In an effort to address test content security issues that were encountered during the 2006 administrations of the Fire Lieutenant and Fire Captains tests, the Performance Measurement Division has revised its test development procedures for public safety jobs. The new procedures utilize subject matter experts from outside the system who volunteer to assist in developing appropriate content for promotional examinations. The revised procedures have led to a much more efficient test development process and more secure test content. A process for internal (i.e., Merit System subject matter expert review) review of the test content and structure is incorporated in the procedures in a manner that prevents the potential leaking of information prior to the test administration process. During 2007, these revised procedures were used to develop the examinations for Fire Lieutenant, Fire Captain, Police/Sheriff Sergeant, Police/Sheriff Lieutenant, Police/Sheriff Captain, and Police Chief I, II, and III.

### *Professional Development*

A continuous goal of the Performance Measurement Division is the professional development of its employees. This focus on development helps staff remain up to date on legal, research, and scientific developments in the area of employee selection. In order to provide effective service, 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 2007.



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

- Adverse Impact, including the Uniform Guidelines’ definition, relevant case law, statistical methods of calculating adverse impact indicators, and interpreting the results of these analyses.
- Critical scores in employee selection tests. Discussion centered around the applicability of setting critical scores for Merit System tests and the manner in which critical scores should be evaluated.
- Setting cut scores for selection tests. Discussion included the definition of cut scores, the difference between cut scores and critical scores, employment/case law relating to the legal appropriateness and defensibility of setting cut scores, the applicability of cut scores for Merit System tests, and the manner in which cut scores should be set and evaluated.
- Research from the Society for Industrial and Organizational Psychology (SIOP) 22nd Annual Conference. Topics included:
  - Cut Score Development as an Extension of the Validation Process
  - Advancing Research on Unproctored Internet Testing
  - Legal Issues in the Use of Cut Scores: Recent Developments
  - The Assessment Center Validity Paradox: Alternative Analytic and Design Methodologies
  - Workplace Stereotypes and Legal Defensibility
  - Flipping the Coin: Considering Children in Work-Family Research
  - Advanced Approaches to Basic Qualifications: Methods and Implications for Organizations
  - Organizations Behaving Badly: Factors Affecting Women’s Well Being at Work
  - Exploring the Use of Forced-Choice Personality Measures in Employee Selection

Starting in September, 2007 the Performance Measurement Division altered the manner in which the continuing education seminars topics are determined and developed. First, voluntary research meetings are held once a month to promote conducting research in the field of employee selection in order to further improve our selection processes and further the research in the field. Alternating on the off months of the research meetings, the Performance Measurement Division

conducts workshops that are mandatory for all division staff. These workshops are developed and conducted by individual teams within the division, such that each team presents one developmental workshop per year. The first workshop was conducted in September and introduced a process called Force Field Analysis. In this process, facilitators worked with staff members within the department to identify and evaluate the current state of the division and the desired state of the division with regard to the services provided to member jurisdictions. Then “forces” that serve as obstacles to reaching the desired state and “forces” that are seen as strengths in propelling the organization toward this state are identified. Staff then discussed how the obstacles can be eliminated or overcome and how key strengths can be leveraged in order to move toward the desired state. The process helped the department identify a number of immediate and long-term initiatives that can help to ensure quality human resource services for the jurisdictions.

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

- In March 2007, four individuals from the Performance Measurement Division participated in an assessment process for entry level firefighter for the City of New Haven, Connecticut. These individuals were trained and performed the assessment process. Upon completion of the assessment, they provided feedback regarding the process by highlighting similarities and differences when compared to the PBJC processes and shared activities and procedures they felt could be beneficial to incorporate into the PBJC’s processes.
- The Performance Measurement Division sent representatives to the Society for Industrial and Organizational Psychology (SIOP) 22nd Annual Conference in New York, NY on April 27-29, 2007. These staff members attended various seminars, expert discussions, and poster presentations related to the work performed within the Performance Measurement Division. Upon return these staff members presented topics of interest and relevance to the work at the PBJC to Performance Measurement staff in May, 2007.
- Brian Bellenger, Ph.D. conducted a presentation in a doctoral consortium held at the 22nd Annual SIOP Conference on April 26, 2007. The consortium was designed to provide doctoral students realistic expectations for work within the field of Industrial & Organizational Psychology and tips for establishing their career. This also provided an opportunity for Dr. Bellenger to share the many advances in selection being utilized by the PBJC and to promote the PBJC as an excellent organization from which employees gain valuable selection experience.
- Libby Miller 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.

Several individuals within the Performance Measurement Division prepared submissions for the 23<sup>rd</sup> Annual SIOF Conference to be held in April of 2008. Papers were submitted in September and included symposium presentations, a poster presentation, and panel discussions. Papers/presentations included:

- **Brink, K. E.**, Lance, C. E., **Bellenger, B. L.**, Morrison, M. A., Scharlau, & **Crenshaw, J. L.**. *Discriminant Validity of a “next generation” assessment center.*
- *The fourth dimension: How response times impact test performance (Symposium) – Brink, K. E. (Chair)*
  - Meyer, J.M., Congemi, P.J., & Miller, A.H. *Evaluating indicators of applicant dropout in selection assessments.*
  - **Allman, R. P. L. & Sutton, M. D.**. *Preparation time, response time, and performance on structured interviews.*
  - **Brink, K. E., Crenshaw, J. L., & Alber, M.** *Relationships between completion time, performance, and faking on biodata/personality.*
  - Wolfe, M. B., Grelle, D., & Kantrowitz, T. *Influence of test design features on ability and personality relationships.*
- *Current issues and trends concerning public safety entry-level and promotional testing (Panel Discussion) – Panelists:*
  - Carnahan, T. J.
  - **Crenshaw, J. L.**
  - Ford, J. M.
  - Hornick, C. W.
  - Chief R. N. Serpas
  - Chief G. Stargell
- *Individual differences, cognitive, and social factors influencing structured interview ratings (Symposium) – Crenshaw, J. L. (Chair)*
  - **Brink, K. E. & Crenshaw, J. L.** *A field study of racial bias in structured interviews.*
  - **Crenshaw, J. L. & Alber, M.** *Impact of assessor personality on structured interview rating process.*
  - **Bellenger, B. L. & Brink, K.E.** *First impression effects in a video-based structured interview.*
  - Brecton, J. B. & **Bellenger, B. L.** *Verbal and nonverbal cues and applicant/rater characteristics in interviews.*
- *Situational Sufficiency of Validation Research Strategies: Considerations in Ensuring an “Appropriate” Level of Professional Rigor (Panel Discussion) – Panelists:*
  - Arnold, J. D.
  - Campion, M. A.
  - Nieminen, L. R. G.
  - **Oliver, L. O.**

- Tippins, N. T.
- Schmitt, N. W.
- Zedeck, S.

Additional professional development activities performed on a routine basis by staff within this division include subscribing to and reading relevant research journals and publications and participating in relevant listservs to gather and share information with other public sector agencies in the areas of job analysis, employment law, employee selection test development, and public sector administration.

## **Future Plans**

The Performance Measurement Division has outlined a number of goals for 2008. These goals focus on creating more efficient work processes and continuously improving the level of service provided to member jurisdictions and the general public. A list of the Performance Measurement's primary goals for 2008 are presented below.

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

The primary purpose of this division is the development and administration of valid and legally defensible selection procedures to serve as the basis for establishing eligible registers. To this end, the Performance Measurement Division has created a testing schedule for 2008 comprised of jobs that have recurring employment needs due to high turnover and/or high number of positions within the system. In addition, this division plans to develop and administer selection procedures in order to establish registers for Fire Promotional jobs (i.e., Fire Apparatus Operator, Fire Lieutenant, Fire Captain, Fire Battalion Chief, Fire Chief) and entry level public safety jobs (Police Officer, Firefighter) during 2008. Also, the Performance Measurement Division will ensure that registers are established as needs arise for other job classes.

*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 process, conducting job family-based job analyses, and providing job analysis information to Classification & Compensation for use in establishing job descriptions and resolving classification issues.

*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.*

Professional development is a permanent goal for the Performance Measurement Division. Initiatives in this area include conducting research in employee selection for submission to journals/conferences/seminars and continuing to conduct bi-monthly "professional development" sessions led by internal staff covering developments and research in the fields of employment law, selection, organizational development, and job analysis.

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

The PBJC continuously evaluates 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 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.

*Reduce the time between the submission of a request for certification and the announcement of the accepting of applications for the needed jobs.*

Over the past several years, the Performance Measurement Division has decreased the time between the receipt of a request for certification and the process of accepting applications. With the elimination of the backlog, reducing this turnaround time even further is a primary goal of the division. Work will continue in this area in order to best meet the needs of the jurisdictions in as timely a manner as possible.

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

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. The Performance Measurement Division intends to develop videos and promotional information that are designed to educate applicants and the general public to the employment processes within the PBJC Merit System. These educational tools will be shared with the public through the internet and through interactions here at the PBJC (e.g. during waiting periods in test administrations).

*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 intends to develop a certification program to train and prepare individuals for assessment of individualized employee selection measures in order to attract and retain the volunteer services of human resource professionals and subject matter experts.

## **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 FTEs - four Training Advisors and one Training Assistant.

- Evelyn Ray, Team Leader, retired in May.
- Helena Bewley, Training Advisor, resigned in September.
- Genae Raines, Training Assistant, transferred to the Jefferson County Rehabilitation and Health Center in October.

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 May 2007 through October 2007.

#### **Supervisory Certificate Program Graduation Celebration**

On the morning of October 10, training hosted the Supervisory Certificate Program Graduation Celebration. This is intended as a bi-annual event. The event was held at the Birmingham Botanical Gardens. The 23 recipients were recognized at the event for their accomplishment.

A continental breakfast was served in the Hodges room, and this allowed time for recipients, leaders, supervisors, and appointing authorities to mix, mingle and congratulate one another. Following breakfast, a more formal ceremony was held in the Auditorium. Lorren Oliver, Director, PBJC, congratulated the recipients and then introduced Joe Fehrmann of Joe Fehrmann Consulting. Mr. Fehrmann spoke on the importance of building trust as a leader.

This inaugural event ended with the presentation of the framed certificates. The event was viewed as a success, and it set a great framework for future celebrations.

### **Jefferson Rehabilitation and Health Center (JRHC) Training**

Training met with Carlette Smith, Director of the JHRC to discuss their leadership training needs. Ms. Smith desired a training option that would allow her entire team to attend as a core group. Due to the specialized needs of this group and the massive changes that they were encountering, training agreed to take the Supervisory Certificate Program on-site to the JRHC.

Over a period of 15 weeks (September – December 2007), training is delivering supervisory and leadership classes to the core leadership group of 20 at the JRHC. All directors, assistant directors, and manager are required to attend. As an added incentive, all 20 will be eligible to receive the Supervisory Certificate in December.

Initial feedback shows that this program is affecting change in their area. Qualitative comments include the following:

- “Felt that program has opened communications and we are in the right direction.”
- “The coaching strategies were enlightening and provided excellent tips for guidance and development.”

Training will continue to work with this group throughout 2008.

### **Department of Revenue Training**

In April, Training met with Travis Hulse, Director, and Eric Pruitt, Deputy Director, from the Department of Revenue. They desired a comprehensive training program to enhance customer service. Training developed three, four-hour modules designed around the areas of customer service, customer and employee conflict, and finding passion in your work. Eric Pruitt worked diligently with his branch coordinators to allow a majority of the employees to attend.

Training offered the sessions over 12 weeks in June, August and October. Anecdotal results showed that employees are beginning to apply concepts learned in these sessions. Due to feedback garnered from the participants, action items were delivered to Mr. Hulse and Mr. Pruitt for them to take forward in the upcoming year.

Training will continue to work with this group in 2008.



## **Delivery of Supervisory and Computer Training courses**

Attendance continues to grow in all PBJC Training courses. From October 1, 2006 – October 1, 2007, the total number of participants in classes was 1818.

In July, 43 persons attended the “Essential Leadership Skills” course. This was the highest attended open enrollment course ever.

## **Needs Analysis**

In September, training began the process of creating a needs analysis survey to gather information from Merit System employees. With the help of the PBJC Testing department, a 15 question survey was created and delivered electronically to hundreds of Merit System employees. Questions on the survey revolved around topics such as training needs, what is keeping you from attending training, best days and times for classes, specific jurisdictional needs, etc.

To date, training has received over 500 completed surveys. They will use this information to guide the strategic direction of the department for the upcoming year.

## **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...

To date, over 140 Merit System employees are enrolled in the Supervisory Certificate Program.

## **Future Plans**

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

**CareerZone** officially went live on April 23, 2007. The new system, designed by IT personnel, allows users to:

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

- Create a personalized schedule of training

The system went on hiatus in October due to a changeover in webmaster personnel at the PBJC. The system is expected to be up and running by December.

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

The Merit System Orientation class consists of three basic modules: Merit System Overview, Rules and Regulations for new employees, and Managing Your Civil Service Career. This class will orient all new hires with the basic information they need once they become a part of the Merit System in Jefferson County.

Training continues to design and develop this content. Current plans call for delivery in 2008.

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

Training continues to search out and consult with law enforcement agencies to determine the best possible options for diversity training. Over the past months, training has previewed DVD's and interviewed multiple law enforcement personnel to gather data.

Contacts were specifically made with Jennifer Kilburn (Sheriff's Department) and Bob Berry (Hoover Homeland Security) who were committee members of the law conference of 2006. Training also spent time with Mark Katrikh, Project Manager for Tools for Tolerance<sup>®</sup>, a cultural diversity program offered in the state of California.

Due to staffing changes in the department, no action has been taken based on all the above research. However, diversity training for law enforcement (and all Merit System employees) will continue to be on the training radar screen in 2008.

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

Over the past 6 months, training has continued to find new ways to market the supervisory skills content.

Marketing kits were created, which consist of instructor biographies, quarterly calendars, certificate information and a course catalog. These are used when meeting with jurisdictional leaders to help share our information in a positive, professional manner.

In order to attract more participants and maximize space, training has redesigned the class flyers. These are sent out weekly to each jurisdiction announcing which classes still have available space, and now carry a more stylized, professional look.

Training is constantly revising, updating and enhancing the supervisory class content, including participant materials, PowerPoint slides, and class content. Since April, every course has been evaluated and enhancements have been made where applicable.

Two new courses were added as elective offerings: *Customer Service Basics* and *From Mad to Glad! Turning your Customer Around*. A third offering, *Finding Passion in your Work* will be offered beginning in 2008.

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

A major initiative is the creation, design and development of an ethics training course for all Merit System employees. Josh Gilliam, Training Advisor and Kimberly Oden-Webster, Jefferson County Human Resources, have worked diligently on this new training opportunity tentatively titled "Keeping the Public's Trust." This training is expected to pilot in early 2008.

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

In April and May, Training offered its second Spanish program for firefighters, EMT and dispatchers. Nine participants attended these sessions, which were facilitated by Helena Bewley, Training Advisor. Through the needs analysis, jurisdictional requests and feedback sessions, Training hopes to have enough data to support a decision for future Spanish language training

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

The Training department and the Performance Measurement department met multiple times to discuss potential classes based on the administrative series job description. Training also created a curriculum based on the KSA's, and reviewed that curriculum with Performance Measurement. In order to provide the most current and relevant content for this group, Training will continue to fine tune the product and push ahead with an implementation for next year.

# **CLASSIFICATION AND COMPENSATION**

## **Overview**

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

Activities include the review, analysis and recommendation of reclassification, re-grade and new position requests initiated by jurisdiction authorities; setting up new positions on the payroll system; the creation of new classifications, the deletion or collapsing of existing classifications; 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, conducting the Annual Classification Survey in accordance with § 12 of the Enabling Act of the State of Alabama, which mandates the review of all positions in the Merit System at least once in a five-year period.

The Classification and Compensation Department is currently staffed with three FTEs. A Compensation Manager who is a Certified Compensation Professional with over 18 years of human resources experience and two Compensation Advisors with over 35 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 the completion of the 2006-2007 Annual Classification Survey and the start of the 2007-2008 Survey that began July 1, 2007.

During the 2006-2007 Survey, Position Description Questionnaires (PDQs) for one thousand one hundred three (1,103) positions were submitted and reviewed. This represents 73% of the population of employees eligible to submit PDQs. Two hundred five (205) individuals were interviewed by the Classification and Compensation staff. This resulted in twenty eight (28) recommendations for reclassification. Eighteen (18) appeals were subsequently filed, only four (4) of

which were on matters appealable to the Board. A public hearing was held on May 18, 2007. The Board adopted the survey on June 12, 2007.

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

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

The 2007-2008 Survey began July 1, 2007. Classifications in the following job families were included: Fire Protection, Police, Sheriff and Security Guard. From September through October, the Classification and Compensation staff reviewed a total of 1,907 PDQs and scheduled 246 on site job audits prompted by additional information presented in the PDQs. Audits will be conducted through January of 2008 and findings and recommendations will be communicated to employees in March of 2008.

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

A major accomplishment of the Department during the report period was the development of a new database to house class specifications. The functionality of this database includes versioning - the ability to track revisions- and the ability to attach supporting documentation to the specifications. The database also provides sophisticated search capability for users.

In addition to the Survey-related activities reported above, for the report period ending October 31, 2007, the Department staff created ten new classifications, approved two hundred ninety nine new position requests, reclassified twelve positions (outside the Annual Survey process), reviewed and approved one hundred thirty three advanced step requests and participated in nine labor market surveys.

#### New Classifications Created:

- Records Analyst II
- Records Manager
- Payroll Specialist
- Risk Manager
- Aircraft Museum Restoration Technician
- MDS Coordinator
- Occupational Therapist
- Public Information Officer
- Facilities Manager – Health Department
- Revenue Integrity Coordinator

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, 40 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.

#### **Future Plans**

- Completing the 2007-2008 Annual Classification Survey will be a major focus of the Classification and Compensation staff during the coming months.
- Improving the communication with Merit System employees and Appointing Authorities regarding the Survey process will also be an important focus of the staff.
- Continued alignment of classification specifications with the job analysis information from Performance Measurement.

# EMPLOYEE RELATIONS

## Overview

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

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

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

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

## Activities and Accomplishments

During November 2006 through October 2007, Employee Relations received notification of 397 employee actions (grievances, disciplinary appeals, etc.). 249 of the 397 actions received were not eligible for appeal in accordance with PBJC Rules and Regulations. 148 of the 397 actions received were eligible for appeal in accordance with PBJC Rules. However, actual appeals were filed in only 87 of the 148 actions eligible for filing an appeal (see tables below).

<b>Not Eligible for Appeal</b>	
<b>Suspensions</b>	144
<b>Dismissals</b>	18
<b>Reprimands</b>	64
<b>Command Discipline</b>	4
<b>Administrative Leave with Pay</b>	19
<b>Total</b>	<b>249</b>

	<b>Eligible for Filing</b>	<b>Actual Appeals</b>
<b>Suspensions</b>	60	17
<b>Dismissals</b>	47	33
<b>Demotions</b>	8	4
<b>Grievances</b>	28	28
<b>Paid Injury Leave (IWP)</b>	4	4
<b>Administrative Leave without Pay</b>	1	1
<b>Total</b>	<b>148</b>	<b>87</b>

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

## **Future Plans**

Historically, the Employee Relations Department has primarily functioned to process existing complaints, grievances and appeals and other matters through the system for consideration by the members of the Personnel Board. The Employee Relations Department will, in 2008, undertake a series of proactive initiatives improving employees' knowledge and awareness of its functions and services. In 2008, The Employee Relations Department will conduct 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 (i.e. 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.



Employee Relations staff will also 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.

Employee Relations staff will 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 Records Management Department is the central focal point for processing all personnel actions. This Department processes hire and re-hire actions for regular, provisional, temporary, and other limited appointments, merit increases, leaves of absence, promotions, demotions, transfers, terminations, and all other employee-related personnel transactions. In addition, the Department generates and issues certification lists.

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

The Department has eight (8) FTEs – four Records Management Specialists, two Personnel Technicians, an Administrative Assistant II, and a Team Lead. Records Management was created in January, 2005, to manage the processing of all electronic transactions in PBJC's Human Resources Information Management System (HRIMS). Several of the staff were part of the Lawson and PeopleAdmin development teams and possess a particular knowledge of the functionality of the systems.

Actions handled by the Department include:

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

## Activities and Accomplishments

The Board's Human Resource Information Management System is working as designed.

A challenge being faced by both Records Management and IT is the resolution of personnel actions that do not process to Lawson through the interfaces utilized by Jefferson County and the City of Birmingham. Data entry errors are, by design, stopped from processing because of edits that are part of the system's logic. When one action stops, all subsequent actions on that individual are also blocked from being processed. This creates a back log of actions, each of which must be researched and addressed. These input errors have been more prevalent than was initially anticipated and, consequently, the effort (resources) required by both Records Management and IT to maintain the interface files has been greater than expected. There has been improvement in recent months, however, as the jurisdictions' payroll coordinators have become better trained.

Since November 1, 2006, the Department has processed:

- One thousand four hundred ninety (1,490) Requests for Certification for two thousand seven hundred thirty eight (2,738) positions.
- Two thousand one hundred twenty seven (2,127) certification lists.
- Five thousand three hundred seventy two (5,372) personnel actions.

An ongoing goal of the Department has been to improve the efficiency and speed of its processing procedures. Over the past twelve months, the Department has achieved an average turnaround time for processing certification lists of .37 business days. This accomplishment is a major milestone in the Board's effort to deliver lists of candidates to requesting jurisdictions in a timely manner.

During the past twelve months, the Records Management Department has completely cross trained all its team members. This constitutes a major accomplishment toward ensuring that the functions of the Department are performed in an efficient manner.

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

During the report period, Toni Reynolds-Aigbogun was promoted from Personnel Technician to Records Management Specialist, and Sandra Jackson was promoted from Accounting Assistant II to fill the vacated position.

## Future Plans

- Automated Payroll Certification began in October in the City of Fultondale. Payroll Certification is a process whereby the payrolls of jurisdictions are programmatically compared to Lawson values and exception reports are automatically generated. A payroll is certified when the exceptions are cleared. In addition to reconciling pay, the process also provides a way for Records Management to identify and reconcile differences with regard to personnel actions related to the employment status of the jurisdictions' employees. Payroll Certification is a joint initiative between Records Management and Data Management. When the module is rolled out to all jurisdictions over the next twelve months, it is the goal of the Department to certify each jurisdiction's payroll at least once each quarter. The payrolls of the Cities of Bessemer and Leeds were audited in October. Both Data Management and Records Management are working with these cities to resolve a number of issues that impede the certification of their payrolls.
- Add a feature to the Board's IVR that telephonically notifies applicants of the jurisdictions to which their names have been certified.
- Develop functionality within the new employee website that will allow Merit System employees to know where vacancies exist for purposes of transfer.
- Implement automatic register purge capability utilizing IVR out-bound caller software.

# 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, 39,586 individuals have filed 119,680 applications using the online application. Applications filed average 3,235 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 system 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.

## 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 ninety-one one-off 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.

Data Management has five FTEs – Two Data Management Specialists, a Systems Analyst and two Data Management Technicians. Vincent Curtis was promoted to the position of Systems Analyst in April. Tamara Brown and Renae Byers joined the staff as Data Technicians in February and April respectively. They serve functionally as the department's Help Desk Analysts, run daily, weekly and monthly reports, and assist Data Management Specialists with the calculation of seniority and eligibility points for purposes of testing and promotion. Kemi Niyiladipo was designated as Lead for this unit in August. As such, Ms. Niyiladipo is responsible for coordinating the unit's workflow, quality controlling output, coordinating the training of the technicians, and providing reports on the unit's production. She also serves as the Board's Business Systems Analyst, a position that bridges the functional responsibilities of Data Management and the technical responsibilities of Systems Support.

## Activities and Accomplishments

A major accomplishment during the report period was the development of a comprehensive disaster recovery plan. In case of a disaster at the 2121 Building, the board staff will be able to work from any location with internet access by connecting directly to redundant equipment housed in the City of Birmingham IT Department. Development of the plan required the installation and configuration of four redundant servers, and the development and implementation of recovery protocols and procedures. A redundant web server has been acquired and is scheduled to be added in the near future.

The Interactive Voice Response (IVR) system continues to provide applicants and Merit System employees with information telephonically twenty-four hours a day, seven days a week. In the past twelve months the IVR system has logged over 20,893 calls from applicants and Merit System employees.

The Board's Applicant Management System was re-bid during the report period. This system includes an online application, online position requisitioning functionality, and a Position Description Questionnaire module. Two bids were received and have been analyzed. The Board intends to award the bid to PeopleAdmin which currently serves as the Board's vendor.

The Board's two websites, PBJCAL, the Board's home site, and JOBSQUEST, the Board's recruitment site are maintained by the IT Department. Because of a technical problem that occurred in the second half of the year with the web statistics program, a precise number of visits to each cannot be provided in this report. However, based on the number of visits during the first half of the report period, it can be estimated that PBJCAL received some 370,000 visits and JOBSQUEST some 446,000 visits. In addition, during the report period, 475,706 Job Alert emails were sent to prospective applicants. Job Alert is an automated feature of JobsQuest that electronically notifies applicants of jobs being advertised in which they have previously expressed interest.

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

In July, the Board's Webmaster, Tim Dwyer, resigned to begin his own consulting business. Effective October 15, 2007, Jerry Roethig replaced Mr. Dwyer. Mr. Roethig has many years of web experience having most recently served as Senior Web Developer with Hypercom Corporation in Phoenix, Arizona.



An important service offered by the Board to users of its online systems is the PBJC Help Desk. The Help Desk is staffed by Data Management personnel during normal business hours and may be accessed either by phone at (205) 279-3444 or by email at [systemsupport@pbjcal.org](mailto:systemsupport@pbjcal.org). For the report period ending October 31<sup>st</sup>, the Help Desk had received 12,054 calls and 677 email tickets for assistance.

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

Because the Performance Measurement Division has increased its production of registers, significant time has been spent during this report period by the Data Management staff calculating eligibility and seniority points for promotional registers. These calculations are critical to proper placement of employees on promotional registers as well as on lay-off lists and for assuring proper bumping rights during reductions-in-force. 2,490 seniority points were calculated during the report period.

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

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

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

## Future Plans

- Increasing the Board's web presence continues to be an important goal. To this end, a committee was formed to design an employee site. The intent is to create a forum for the PBJC to interact more directly with Merit System employees, to keep abreast of what is on their minds, and to provide a mechanism for sharing information of mutual interest. Functional specifications have been developed and the site is currently under development and is scheduled for release in mid 2008.
- As part of increasing its web presence, the Board is interested in assuring that its web sites are accessible to people with visual disabilities. Currently, federal government web sites must comply with Regulation 508 standards to assure accessibility. The Board will review and modify, as necessary, its existing sites to assure maximum accessibility and will design new sites with 508 standards in mind.
- The Department maintains an interest in creating automated register purge script capability utilizing IVR functionality. The capability will entail auto-dialing all individuals on a given register and, following verification, allowing the call recipient to telephonically indicate whether he/she wishes to remain active on that register. The information will then be uploaded to the Board's applicant tracking system (Sigma) to accomplish the register purge. The software was recently bid. No vendors responded. It is currently being re-bid to an identified audience.
- An upgrade to the Board's Image Now software is scheduled for November.
- Lawson is decommissioning Version 8 of its product. This will require clients to upgrade to Lawson Foundation 9.0 (LSF9). Migrating to this product will require a significant effort and commitment of resources on the part of the Board and the IT staff. Implementation was scheduled to begin in November or December 2007. However, this is being delayed due to unexpected and significant issues with the City of Birmingham's payroll schedules.
- The Department has acquired a new web server to be added to the current disaster recovery servers. Once this server is installed and configured, the Board's websites will be protected from down time.