



**Personnel Board**  
A career. A purpose. A life.

# 2020

## ANNUAL REPORT

## Report Contents

The content of this report covers the 2020 calendar year (i.e., January 1, 2020 – December 31, 2020). This report was submitted to the Citizens Supervisory Commission at their semi-annual meeting held on May 18, 2021.

## Electronic Copies

The electronic version of this report contains hyperlinks to additional information for interested individuals. To obtain an electronic copy of this report, please visit the Personnel Board website at:

<http://www.pbjcal.org/about/annualreports.aspx>

# Table of Contents

Letter from Director 5	Personnel Board Merit System 7	Governance & Organizational Structure 9
Citizens Supervisory Commission 11	Three-Member Board 13	Mission & Values 15
Departments & Services 16	Financial Report FY2020 18	Workforce Levels & Demographics 20
Recruiting Talent 23	Application & Employment Activity 24	Annual Classification Survey 27
Administrative Appeal Hearings 29	Job Analysis & Employment Testing 31	Training & Org Development 33
	Service Modifications & Enhancements 35	

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# Letter from the Director

Dear Citizen Supervisory Commission:

As we are all aware, 2020 was marked by tremendous challenges. As I reflect on the year, however, I believe that it is not these challenges that defines this year, but rather how we met and overcame those challenges. The dedication and resilience of our Personnel Board of Jefferson County employees and the employees of the entire Merit System has perhaps never been more evident than in this turbulent year.

We began 2020 with a clear strategic plan, then the COVID-19 pandemic changed nearly everything — disrupting how we live and work and exacting significant organizational, social, and personal costs. Over the years, I have witnessed our employees' commitment to the work of the Personnel Board and the Merit System, but at no time has this commitment been clearer than in the face of this pandemic. Each day brought out and highlighted the creativity and competence of our employees to confront every challenge and ensure that, regardless of any obstacle, the services needed by our member agencies were provided at the highest possible level. I am deeply thankful to them for all that they have done and continue to do.

As the realities of the public health threat began to be realized in March of 2020, leadership within the Personnel Board promptly assessed the situation and outlined the immediate priorities to carry us through the pandemic:

- Protect the health and well-being of the Personnel Board employees and the communities we serve;
- Evaluate and modify operations and processes to ensure continuity of service throughout the pandemic in a safe and effective manner; and
- Reduce operational costs and expenses in anticipation of reduced revenue for our member agencies.

Very early in the pandemic, the Personnel Board directly and aggressively worked to modify its financial outlook and operations by making significant and deliberate efforts to curtail its expenses in anticipation of potential financial challenges faced by our member agencies as a result of reduced revenue. The financial section of this annual report provides detail on the Board's efforts in this regard, and I am proud to announce that the Personnel Board ended the fiscal year more than \$1.3 million under budget.

Despite the substantial reduction in expenses and the numerous issues presented by the pandemic, the Personnel Board managed to effectively implement significant process changes to provide its services in a safe and effective manner. The Board immediately worked to address employee health and safety during the pandemic by establishing a policy regarding Personnel Board operations under public health/safety crisis; developing a comprehensive operational plan to address the COVID-19 public health threat; obtaining funding through the COVID-19 Coronavirus Relief Fund to acquire needed personal protective equipment, information technology, and other related resources to ensure safe operations; and modifying services and operational activities to abide by recommendations and guidelines provided by the Center for Disease Control and state and local health agencies. The various sections of this report provide additional detail on the service modifications and enhancements adopted and implemented by the Personnel Board over the course of the year to address public health threats and ensure, not only continuity of service, but also significant service improvements.

Also during 2020, our communities and the nation called out for social and racial justice. As the administrative hub of a diverse and vibrant Merit System, the Personnel Board is uniquely placed to play a critical role in helping to strive toward justice for all people, particularly within the context of employment within our member agencies. Promoting fairness and equality is among the most critical elements of our mission and the spotlight placed on social justice during 2020 has helped to renew our emphasis on these issues and reinvigorate a critical review of outcomes associated with our services. To this end, the Personnel Board has and will continue to work to ensure that our mission is realized and our core values upheld.

I'm proud of the meaningful progress made by the Personnel Board in 2020. We have maintained momentum despite the difficult circumstances and intend to build on that momentum. We will continue to critically evaluate the lessons learned during this challenging year and leverage that knowledge to effectively build for the future.

Sincerely,

Lorren Oliver

Executive Director, Personnel Board of Jefferson County



# Personnel Board Merit System

The Personnel Board of Jefferson County Merit System includes nearly 8000 employees from 22 municipalities and government agencies who devote their efforts to serving the public. Employees within the Merit System work within in a wide variety of exciting fields and meaningful professions. Working in careers ranging from public safety, city management and information technology, to public works, medical services and engineering, just to name a few, our Merit System employees are making a difference in the communities that they serve.

The Personnel Board is dedicated to effectively supporting the employment needs of our over 700 civil service occupations and establishing a model civil service system for our communities. Individuals interested in establishing a career in the public service can explore our many exciting opportunities at [JobsQuest.org](http://JobsQuest.org).

The Personnel Board of Jefferson County's Merit System includes a wonderfully diverse set of municipal governments, ranging from smaller, community-minded towns to vibrant, bustling cities. Also included are the Jefferson County Commission and four county-wide agencies providing critical public services to our communities.

## Municipalities

Bessemer	Leeds
Birmingham	Midfield
Center Point	Mountain Brook
Fairfield	Pleasant Grove
Fultondale	Tarrant
Gardendale	Trussville
Homewood	Vestavia Hills
Hueytown	Warrior Police
Irondale	

## County-wide Agencies

Jefferson County Commission  
 Emergency Management Agency  
 General Retirement System  
 Jefferson County Department of Health  
 Personnel Board of Jefferson County



Personnel Board  
of Jefferson County

2121

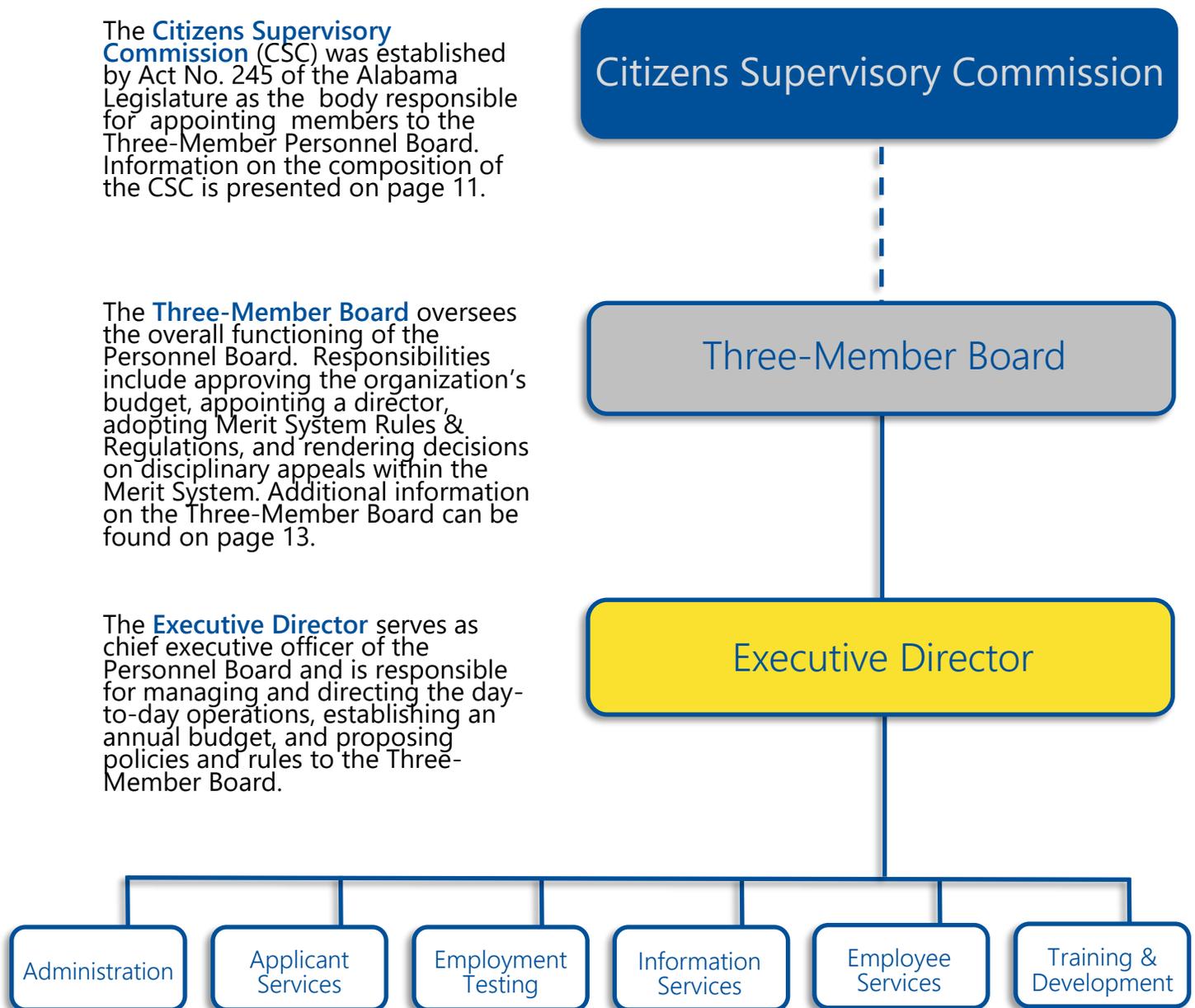


# Governance & Organizational Structure

The **Citizens Supervisory Commission** (CSC) was established by Act No. 245 of the Alabama Legislature as the body responsible for appointing members to the Three-Member Personnel Board. Information on the composition of the CSC is presented on page 11.

The **Three-Member Board** oversees the overall functioning of the Personnel Board. Responsibilities include approving the organization's budget, appointing a director, adopting Merit System Rules & Regulations, and rendering decisions on disciplinary appeals within the Merit System. Additional information on the Three-Member Board can be found on page 13.

The **Executive Director** serves as chief executive officer of the Personnel Board and is responsible for managing and directing the day-to-day operations, establishing an annual budget, and proposing policies and rules to the Three-Member Board.



Staff within the departments of the Personnel Board provide a variety of services to Merit System agencies and carry out the day-to-day responsibilities of the organization. Specific information on the services and responsibilities of each department are provided on pages 16 and 17.

Center Point,  
Alabama



# Citizens Supervisory Commission

The Alabama legislature created the **Citizens Supervisory Commission (CSC)**, a group of community leaders, in order to ensure the appointment of an apolitical Three-Member Board to oversee the Merit System in Jefferson County. A number of changes to the composition of the CSC occurred in 2020, including the establishment of a new chair of the Commission. After many years of dutiful service as the Chair of the CSC, the Honorable Alan L. King oversaw his final meeting as CSC Chair at the semi-annual meeting held on May 19, 2020. County Probate Judge James P. Naftel was recognized as the new Chair of the CSC and served for the first time in that capacity at the second semi-annual meeting of the CSC on November 17, 2020.

## Members

Judge James P. Naftel  
County Probate Judge

Dr. Cynthia Anthony  
President, Lawson State Community  
College

Mr. William Barnes  
President, Birmingham Urban League

Mr. Keith A. Brown, J.D.  
President, Jefferson State Community  
College

Mr. Daniel Coleman  
President, Birmingham-Southern

Ms. Dorothea Crosby  
President, NAACP Birmingham

Ms. Andreia Griggs  
County Employee Representative

Ms. Marrienne Hayward  
President, Central Alabama Labor  
Federation

Pastor E.O. Jackson; President  
Interdenominational Ministerial  
Alliance of Greater Birmingham

Mr. Ron Kitchens  
President, Birmingham Business  
Alliance

Ms. Bobbie Knight, J.D.  
President, Miles College

Mr. James D. Love  
Municipal Employee Representative

Dr. Justin Meollinger  
President, Jefferson Co. Medical  
Society

Ms. Jan Plyler  
President, Jefferson County Council of  
PTA

Dr. Ray L. Watts  
President, University of Alabama at  
Birmingham

Dr. Andrew Westmoreland  
President, Samford University



Bessemer,  
Alabama



Fultondale,  
Alabama

# Three-Member Personnel Board

The **Three-Member Board** serves as the primary governing body overseeing the Merit System of Jefferson County and is appointed by the Citizens Supervisory Commission for staggered six-year terms (except when filling unexpired terms of previous place holders).

**Place 1: Judge L. Kenneth Moore** has served on the Board since 2006 and is currently the Board Chair. He is a graduate of Auburn University and received his Juris Doctorate from Samford University. He has had a long career in public service, including serving in the administrations of Governor Albert Brewer and Senator John Sparkman. Currently, Judge Moore serves as Municipal Judge for Hueytown, Criminal Prosecutor for the City of Adamsville, and sits as the Alabama State Bar Commissioner for the Bessemer Cut-off. Along with his public service work, Judge Moore also maintains a private law practice in Bessemer.

**Place 2: Ms. Jacqueline Smoke** was elected to Associate Member Place #2 in 2017. She is a graduate of the University of Alabama, where she earned a Bachelor of Science degree in Electrical Engineering and a Juris Doctorate from the School of Law. Ms. Smoke's career has included extensive experience in engineering operations with Alabama Power and Bessemer Utilities and a diverse law career that includes working within the Tuscaloosa and Jefferson County District Attorney's offices, the Montgomery County Probate Court, private law firms. She also manages her own civil and criminal law practice, with a major focus on consumer protection and product safety, appellate cases, and probate matters.

**Place 3: Mr. Guin Robinson** was elected to the Three-Member Board in September of 2018 as Associate Member Place #3. Mr. Robinson is currently the Associate Dean of Economic Development for Jefferson State Community College. During his career he has been extensively involved in community and professional organizations having served as Executive Director of Region 2020; Chair of the Birmingham Regional Transit Authority and Regional Planning Commission of Greater Birmingham; and Board Member for Alabama Historical Commission, Children's Aid Society, Kid One, and the United Way of Central Alabama, among others. Mr. Robinson was also the first full-time mayor of Pell City, Alabama. He has a Bachelor of Science Degree in Public Administration from Auburn University and a Masters in Education Leadership from UAB.



Homewood,  
Alabama

# Mission & Values

## Mission

The Personnel Board's mission is to establish and facilitate a model merit (civil service) system that enhances the employment and development of government employees through innovative, efficient, and effective human resources practices that firmly uphold our values and the principles of civil service, promote fairness and equality, and comply with applicable laws.

## Values

The Personnel Board strives to achieve its mission by adhering to and promoting the following Merit System values:

### Professional Values

Serving professionally with dedication, competence, and efficiency.

### Civic Values

Pursuing public interest with accountability and transparency.

### Ethical Values

Acting equitably, ethically, reliably, and with integrity so as to uphold public trust.

### Human Values

Demonstrating respect, compassion, dignity and fairness in dealings with citizens and fellow public servants.

# Departments & Services

The Personnel Board is comprised of multiple departments that provide vital services to our member agencies. Presented is an overview of our departments and their primary functions.

**Administration** is responsible for executive oversight of all Personnel Board functions and operations, and for developing and ensuring organizational compliance with laws, rules, and organizational policies. Additionally, the department is responsible for creating financial operating policies and procedures; establishing and monitoring organizational contractual agreements; preparing the annual operating budget and developing budgets for major initiatives; and processing payroll for Board employees.

**Applicant Services** is responsible for developing recruiting and marketing strategies that encourage individuals to consider careers in civil service and promote the Merit System as an employer of choice in Jefferson County. The department is committed to providing equal opportunity in the recruitment process regardless of race, creed, color, national origin, religion, age, disability, or veteran status to the full extent protected by the law. Work within this department includes announcing the acceptance of applications for Merit System jobs, implementing targeted recruiting efforts for hard to fill positions, reviewing and screening applications, receiving requests to fill vacancies from our member agencies, and issuing certification lists containing application information for individuals eligible for hire.

**Information Services** consists of three business units focused on the information technology and information management needs of the Personnel Board and the Merit System—Business Systems & Reporting, Information Technology, and Application Development. Information Services serves as a technical hub for the Personnel Board and the central operations unit responsible for processing personnel actions, maintaining employee history, troubleshooting functional system issues, training and assisting system users, creating management reports, maintaining systems authorization, calculating seniority and eligibility, network system maintenance and support, and web-based and desktop application development. The department also provides technical assistance to our member agencies that use the Board's information systems.

**Training & Organizational Development** provides opportunities for employees to develop their personal and professional knowledge, skills, and abilities through a wide array of training and development offerings. In all, the department offers over 50 training programs in both technical and non-technical area for Merit System employees. Courses include, among many additional topics, leadership, management, process improvement, communications, customer service, computer skills, diversity, ethics, and legal issues. These training opportunities are always free of charge to employees of the Merit System. Additionally, the department oversees the employee performance management process and provides customized training based on the individual needs of our Merit System customers.

**Employee Services** is comprised of Classification & Compensation and Employee Relations. Classification & Compensation is responsible for ensuring that employees are properly assigned to job classes and that job classes are appropriately assigned to salary grades. The department administers the annual classification survey, conducts job audits, reviews independent contractor services, and collects and analyzes labor market data to ensure the competitive positioning of Merit System jobs. Employee Relations is the workforce compliance arm for the Merit System, tasked with ensuring that the Rules and Regulations of the Personnel Board and the Enabling Act are adhered to in the administration of the grievance and disciplinary appeals processes. Employee Relations team members interact daily with employees, supervisors, and department heads to provide guidance on the interpretation and application of the Rules and Regulations. Additionally, Employee Relations advisors facilitate the administrative hearing process, a quasi-judicial forum where disciplinary appeals are heard by a third-party Hearing Officer, who renders a report and recommendation to the Three-Member Board.

**Employment Testing** facilitates the hiring of well-qualified and successful employees into Merit System positions through the development and administration of valid and legally defensible employee selection processes. To accomplish this, Employment Testing performs thorough job analyses on Merit System jobs; develops selection tests that are fair, valid, and that relate to the job; and establishes eligible registers for use by Merit System agencies for the hiring of top talent. The types of selection systems developed and administered include structured interviews, computer-based skills assessments, high-fidelity job simulations, work samples, and assessment centers. The division strives to maximize the efficiency and effectiveness of large-scale test administrations by leveraging technology to enhance and facilitate the test administration and candidate evaluation process.

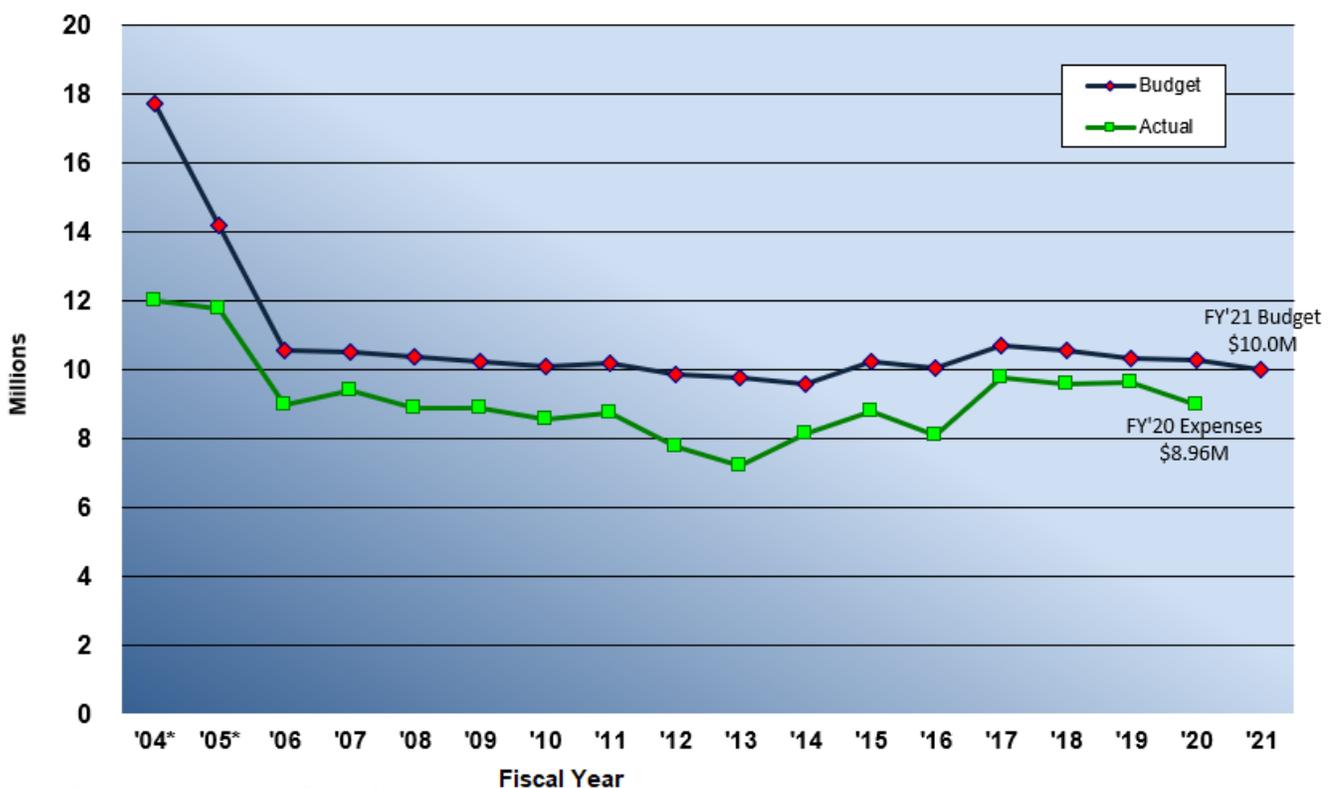
# Financial Report Fiscal Year 2020

The 2020 fiscal year presented many challenges and uncertainties for the Personnel Board and its member agencies. Due to the COVID-19 pandemic, the Board anticipated that many Merit System agencies may have significant reductions in their revenue for the fiscal year (FY) and, therefore, quickly made significant and deliberate efforts to curtail its expenses. In addition to several austerity measures aimed at expense reduction, the social distancing requirements that dominated much of the year resulted in certain services, and their associated expenses, to be completely halted (the direct impact of the COVID-19 pandemic on our services is discussed later in this report). Where possible, the Personnel Board made substantial modifications to the nature of our work with an eye toward ensuring that we provided quality service to our member agencies and continued to meet our statutory mandate. All of these efforts, including other cost cutting initiatives, significantly reduced the Board's expenses for FY2020 (i.e., October 1, 2019 to September 30, 2020) compared to previous fiscal years.

The Three-Member Board approved a FY2020 budget in the amount of \$10.3 million, a decrease of over \$33,000 from the FY2019 budget. As mentioned above, the Personnel Board worked diligently to lower expenses and came in approximately \$1.3 million under budget for FY2020, with actual expenditures totaling \$8,957,374.

In July 2020, the Three-Member Board voted unanimously to approve the FY2021 budget in the amount of \$10.0 million, a decrease of over \$300,000 compared to FY2020 and over \$335,000 less than FY2019 budget. The chart below presents a year by year tracking of the Personnel Board's fiscal year budgets and actual expenditures since 2004.

## Year-by-Year Budget & Expenses



The Personnel Board FY2020 expenses were \$8,957,374, approximately \$1.3M under budget. The table to the right provides a breakdown of FY2020 expenditures.

## Fiscal Year 2020 Expenditures

Personnel Costs	\$5,713,456
Employee Benefits	\$1,394,274
Legislative Allowance (Board Members' compensation)	\$3,150
Advertising	\$47,999
Systems Maintenance (includes hosting fees)	\$452,783
Travel (volunteer assessor travel & recruiting travel)	\$6,269
Legal Expenses	\$282,340
Other Professional Services (exam & transcription services)	\$205,049
Insurance Premiums	\$33,210
Rental-Facilities (hotel accommodations for volunteer assessors)	\$49,065
Office Supplies	\$8,732
Computer Equipment and Software	\$72,495
Hospitality (meals for volunteer assessors and training special events)	\$14,706
Rent (rental of office space in 2121 building)	\$635,363
Other (includes telephone expenses, copier rentals, etc.)	\$38,483
<b>Total</b>	<b>\$8,957,374</b>

## Allocation of Expenses

Agency	Percentage
Birmingham	37.5%
Jefferson County*	29.7%
Bessemer	6.3%
Health Dept	5.4%
Homewood	3.6%
Vestavia Hills	3.2%
Mountain Brook	2.5%
Trussville	2.4%
Irondale	1.6%
Gardendale	1.6%
Hueytown	1.5%
Leeds	0.9%
Tarrant	0.9%
Fultondale	0.7%
Midfield	0.6%
Pleasant Grove	0.6%
Fairfield	0.5%
Center Point	0.5%
Warrior	0.2%

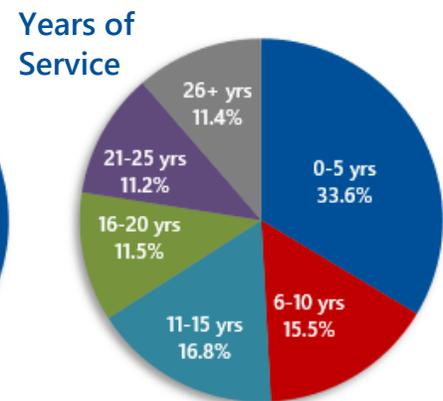
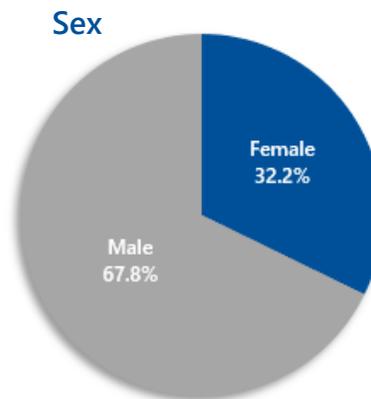
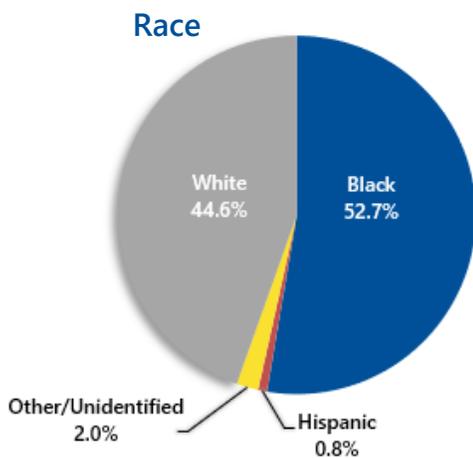
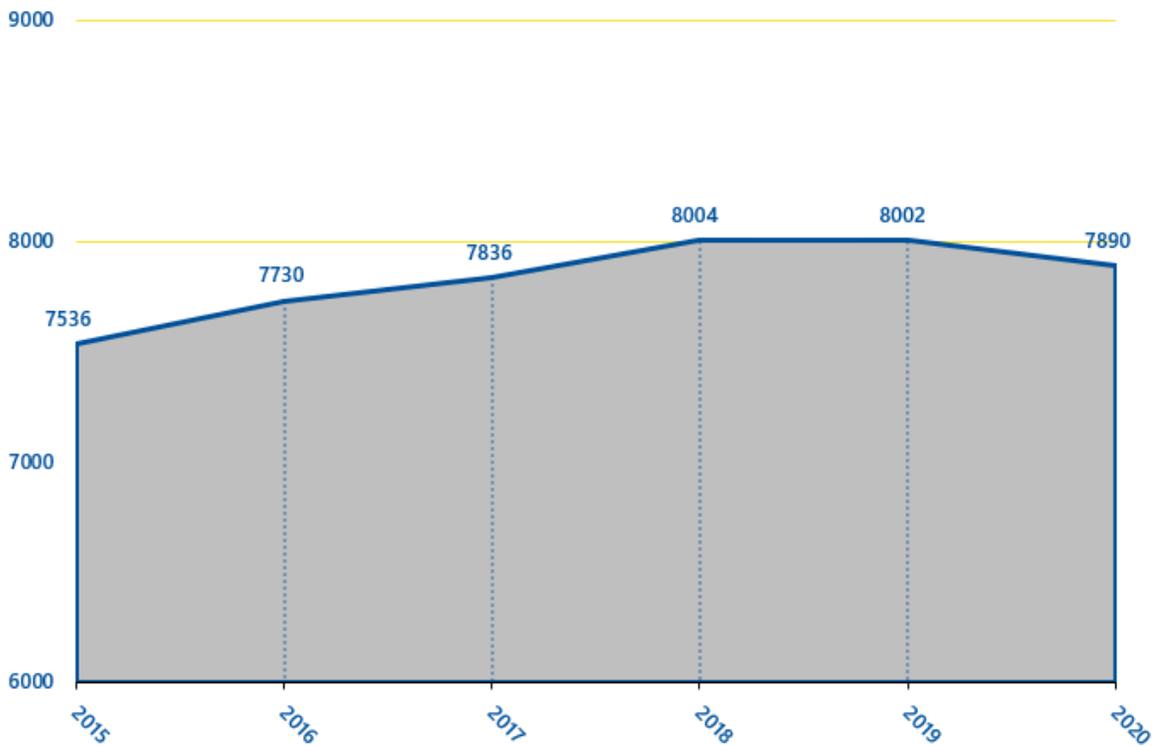
\* Includes EMA and GRS (Pension Board)

The Personnel Board's expenses throughout the fiscal year are paid by the Jefferson County Commission. At the conclusion of the fiscal year, Jefferson County submits to the Personnel Board the itemized expenses for Board operations. The Executive Director certifies the expenditures and the allocation of expenses to be billed to the member agencies, based on each agency's number of classified employees, and submits the information to the Three-Member Board for approval. Presented to the left are the percentages of Personnel Board expenses allocated to each agency for fiscal year 2020.

# Workforce Levels & Demographics

The Merit System employs diverse and highly qualified public servants ensuring the safety of our citizens and the continuity of our governments. These dedicated employees strive to provide excellent service to our communities and citizens. Presented within this section is a summary of the total number and demographics of our Merit System employees. In 2020, the number of Merit System employees dropped slightly (approximately 1.4%) from the preceding year to a total of 7890 employees.

## Merit System Employees by Year & Demographic Breakdown



## Merit System Agency Employment Totals & Demographics

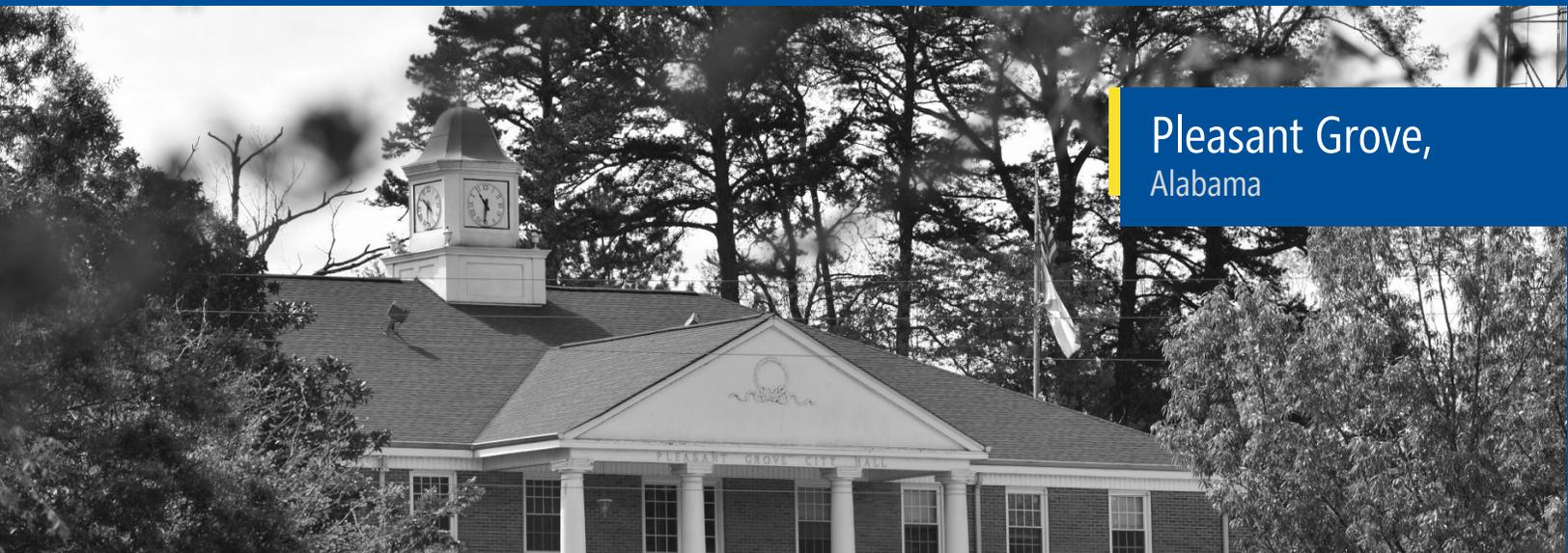
Merit System Agency	Total	Sex		Race		
		Female	Male	Black	White	Other/ Undisclosed
Bessemer	490	120	370	345	135	10
Birmingham	2943	838	2105	1962	920	61
Center Point	38	14	24	21	16	1
Emergency Mgt. Agency	7	3	4	1	6	0
Department of Health	421	328	93	278	107	36
Fairfield	36	6	30	29	6	1
Fultondale	53	16	37	13	40	0
Gardendale	122	23	99	8	112	2
General Retirement Sys.	4	3	1	0	4	0
Homewood	279	48	231	62	212	5
Hueytown	114	24	90	15	95	4
Irondale	126	25	101	28	94	4
Jefferson County	2316	924	1392	1246	1009	61
Leeds	73	8	65	8	63	2
Midfield	47	8	39	31	15	1
Mountain Brook	195	29	166	27	161	7
Personnel Board	58	33	25	31	26	1
Pleasant Grove	45	9	36	4	39	2
Tarrant	72	15	57	15	55	2
Trussville	188	38	150	11	169	8
Vestavia Hills	248	29	219	19	218	11
Warrior	15	2	13	2	13	0
<b>Merit System</b>	<b>7890</b>	<b>2543</b>	<b>5347</b>	<b>4156</b>	<b>3515</b>	<b>219</b>



Vestavia Hills,  
Alabama



Warrior,  
Alabama



Pleasant Grove,  
Alabama

# Recruiting Talent

Attracting high quality and diverse talent to the Merit System is one of the most significant responsibilities of the Personnel Board. In an effort to effectively meet the needs of the agencies served, the Personnel Board develops recruiting and marketing strategies that encourage individuals to consider careers in civil service and promote the Merit System as an employer of choice in Jefferson County. The Personnel Board combines general marketing and branding campaigns designed to increase awareness of the Merit System and employment opportunities. The Board also engages in more specific employment recruiting activities targeted at generating interest of highly qualified individuals in certain harder to fill jobs and job families.

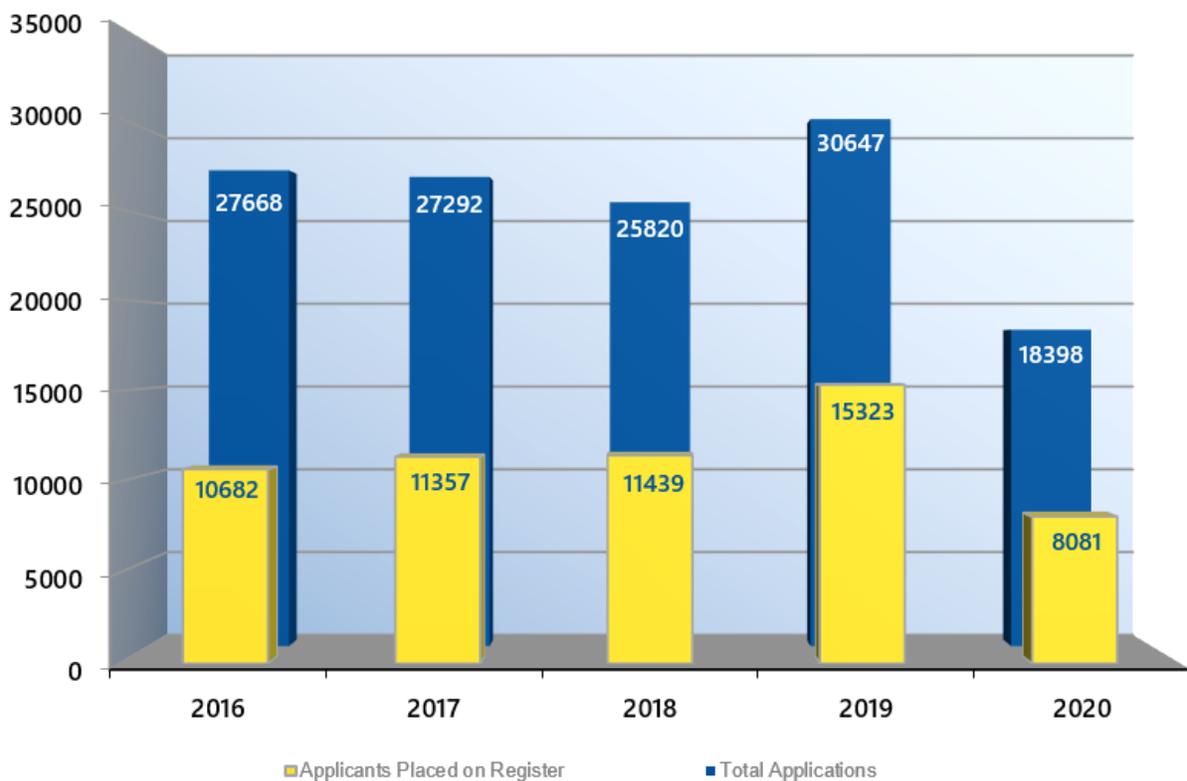
The Personnel Board takes a multi-pronged approach to generating awareness of the Merit System and our employment site, JobsQuest.org. Through this employment website, the Board presents exciting and rewarding career opportunities offered within the Merit System. The Personnel Board works to establish effective connections with prospective employees by marketing in a manner that emphasizes the meaning and satisfaction employees of our public sector organizations experience through their careers. Emphasizing our branding tagline—*A Career. A Purpose. A Life.*— we seek to attract potential candidates for employment who have a desire to make a difference. Whether attracting talented individuals from the communities we serve or marketing our wonderful communities to highly-skilled individuals from outside the local area, the Personnel Board is committed to assisting our agencies with employing highly capable and dedicated employees.

In 2020, many of the Personnel Board's recruiting efforts and strategies were significantly altered due to the COVID-19 pandemic. The Board typically engages in many in-person recruiting activities, including attending as many as 50 career events and hosting the annual First Responders Night with the Birmingham Barons at Regions Field. However, due to the public health concerns related to the pandemic, many of these in-person activities were unavailable in 2020. Therefore, the Board focused its efforts on those activities that did not require a physical presence, including targeting job postings on various industry-specific web sites and job boards, networking and posting on LinkedIn, Facebook, and Twitter, networking and virtual career events with College and University career placement offices and state career centers, as well as contacts with local high school vocational career programs. The board also utilized more traditional marketing and recruiting efforts such advertising in local newspapers including Iron City Ink, The Birmingham Times, and The Hoover Sun.

# Application & Employment Activity

One of the Personnel Board's primary responsibilities is processing requests to fill employment vacancies (referred to as certification requests) and issuing lists of eligible candidates (referred to as certification lists) to agencies and departments throughout the Merit System in order to facilitate hiring. In 2020, the COVID-19 pandemic significantly impacted hiring, job postings, and employment testing. Due to limitations on employment testing (discussed later in this report) and the subsequent reduction in the number of jobs posted, at 18,398 applications received for the year, the Personnel Board experienced the lowest number of job applications in a single year since 2013. The Applicant Services department placed 8,081 applicants on eligible registers. A total of 1,453 appointments (including new hires, promotions, and lateral appointments) were made across all Merit System agencies during 2020.

## Application Activity for the Past Five Years



Presented on the subsequent page is a further breakdown of the application and register activity for the year. Also included are data on certification and hiring activity by agency.

## 2020 Applications & Certifications

Agency	Total	Sex			Race		
		Male	Female	Unknown	Black	White	Other/ Unknown
Applications Received	18,398	8,029	9,700	669	12,288	4,767	1,343
Applications Placed on Register <sup>1</sup>	8,081	2,721	5,086	274	5,658	1,859	564
Applications Certified <sup>1</sup>	49,194	28,771	18,473	1,949	29,173	16,205	3,816
Bessemer	3467	2113	1151	203	2,339	821	307
Birmingham	11762	6214	4917	631	7,735	2,951	1,076
Center Point	311	138	162	11	253	47	11
Emergency Mgt Agency	0	0	0	0	0	0	0
Fairfield	432	152	275	5	338	70	24
Fultondale	1367	943	404	20	779	513	75
Gardendale	1174	829	295	50	592	483	99
Health Department	2282	445	1763	74	1,697	379	206
Homewood	2496	1600	784	112	1,388	962	146
Hueytown	1677	1100	509	68	1,022	526	129
Irondale	1282	757	479	46	708	470	104
Jefferson County	5143	2288	2536	318	3,269	1,390	484
Leeds	1565	1156	358	51	702	751	112
Midfield	820	428	369	23	520	230	70
Mountain Brook	2804	2012	731	61	1,310	1,327	167
Personnel Board	270	155	109	6	202	56	12
Pleasant Grove	2440	1613	772	55	1,422	854	164
Sheriff's Office	1552	1174	347	31	751	713	88
Tarrant	1051	663	344	44	584	385	82
Trussville	2602	1551	983	68	1,387	1,048	167
Vestavia Hills	3906	2835	1015	56	1,845	1,818	243
Warrior	791	605	170	16	330	411	50

## 2020 Hires & Appointments (Promotions & Lateral Appointments)

Agency	Total	Agency	Total
Bessemer	86	Jefferson County	390
Birmingham	426	Leeds	11
Center Point	8	Midfield	13
Emergency Mgt Agency	0	Mountain Brook	35
Fairfield	3	Personnel Board	6
Fultondale	7	Pleasant Grove	14
Gardendale	15	Sheriff's Office	134
Health Department	89	Tarrant	21
Homewood	71	Trussville	67
Hueytown	15	Vestavia Hills	22
Irondale	15	Warrior	5



Irondale,  
Alabama



Trussville,  
Alabama

# Annual Classification Survey

## 2019-2020 Job Families Completed Surveys

The Personnel Board is statutorily required to review positions within the Merit System at least once every five years to ensure positions are classified in the correct job class in accordance with the Board's Salary Administration and Classification Plan. The Personnel Board utilizes an annual job analysis and classification survey and audit process to make an assessment as to whether the duties performed by any specific employee are consistent with his or her class (or more consistent with another class in the Merit System) and to gather job analysis data on Merit System job classes. The 2019-2020 classification survey evaluated positions in 104 jobs across 11 job families. Of the 1,160 eligible employees, 57% participated in the survey. A total of 13 positions were recommended for reclassification.

- Clerical
- Community & Economic Development
- Court Administration
- Detention & Corrections
- Environmental Protection
- Food Preparation
- Park Maintenance
- Parole & Probation
- Payroll & Pension
- Social Work
- Traffic Services

## New Job Classes

Six new job classes were established by the Personnel Board for use within the Merit System during 2020. The established job classes and their associated pay grades are provided to the right.

Academy Director	G 27
City Administrator	G 34
Medical Billing Specialist	G 17
Payroll Supervisor	G 24
Senior Event Manager	G 26
Sewer Maintenance Planner/Scheduler	G 22

## 2020-2021 Job Families Being Surveyed

The Personnel Board also began the 2020-2021 job analysis and classification survey process during the period covered by this annual report. This process will continue into 2021 and includes 115 jobs across 13 job families.

- Accounting
- Appraisal & Taxation
- Architecture & Design
- Audit
- Civil Engineering
- Communications
- Emergency Communications
- Environmental Protection
- Finance Management
- Fire Protection & EMS
- Mechanical Technology
- Planning
- Public Works Operations



Gardendale,  
Alabama

# Administrative Appeal Hearings

One of the essential functions of the Personnel Board includes ensuring that Merit System employees in *Regular* status who have been subject to certain disciplinary or adverse employment actions are provided an avenue for due process, if they wish to appeal the action. The Board administers the disciplinary appeal and hearing process — a quasi-judicial forum where employee appeals are evaluated by a third-party Hearing Officer who renders a recommendation to the Three-Member Board for a final ruling.

In 2020, the Personnel Board received notification of 281 adverse employment actions. Of those actions, 41% were eligible for appeal in accordance with the Rules & Regulations and Administrative Appeals Procedures. Of those employees who were eligible, 42% exercised their right to appeal. The tables on the following page provide a breakdown of the adverse employment actions and resulting appeals. *Please note that some appeals received in 2020 carried into 2021*

The Personnel Board concluded 25 disciplinary appeal hearings in the 2020 calendar year. The Three-Member Board upheld the Appointing Authority's decision in eight of the cases, four cases were modified and 13 cases settled during the appeal process. The table below presents a breakdown of the outcome of the appeal hearings. *Note that some hearing decisions rendered in 2020 were based on actions initially filed in an earlier year.*

## 2020 Disciplinary Actions & Hearing Outcomes

Disciplinary Action	Number of Actions	Appeal Not Eligible	Appeal Eligible	Appeal Reviews
Suspensions	187	138	49	21
Terminations	53	0	53	23
Grievances	23	23	0	0
Demotions	8	0	8	4
ALWOP	10	6	4	0
<b>Totals</b>	<b>281</b>	<b>167</b>	<b>114</b>	<b>48</b>

Action Appealed	Total	Upheld	Modified	Settled
Suspensions	12	3	1	8
Demotions	1	0	0	1
Terminations	12	5	3	4
<b>All Appeal Hearings</b>	<b>25</b>	<b>8</b>	<b>4</b>	<b>13</b>

Mountain Brook,  
Alabama



Fairfield,  
Alabama



Midfield,  
Alabama



# Job Analysis & Employment Testing

The Personnel Board is charged with assessing the qualifications and relevant job skills of applicants for employment to ensure the hiring of well-qualified employees into Merit System positions. To this end, the Board is responsible for the administration of valid and legally defensible testing and selection procedures. In order to achieve this goal of valid and legally defensible employment procedures, the Personnel Board must maintain up-to-date job analyses for all Merit System jobs.

The Personnel Board works diligently to conduct job analyses for each Merit System job class at least once every five years. The job analysis process is a detailed evaluation of the job conducted with extensive input from incumbents, supervisors, and/or other subject matter experts. During the job analysis, staff perform on-site job observations, facilitate interviews and focus group meetings, administer surveys, and analyze job data. These job analyses drive the development of minimum qualifications, the content of performance appraisals, target content for training courses, and the development of employment selection examinations.

During 2020, the COVID-19 virus made many of the normal job analysis procedures unsafe, so modifications were made to ensure work was completed appropriately while still adhering to social distancing guidelines necessary to minimize the risk of potential virus spread. Specifically, on-site observations, which are typically conducted at an employee's job site, had to be conducted through virtual meetings. Focus group meetings also had to be conducted using virtual technology rather than being conducted in person. In spite of these limitations, the Employment Testing Division completed job analyses for 156 separate job classes, of which 104 were included in the 2019-20 Annual Classification and Job Analysis Survey.

Under normal circumstances, the Board leverages job analysis data to develop and administer competitive examinations for various Merit System jobs. However, due to COVID-19, testing operations, which inevitably require job candidates to be in close proximity to one another and often in large numbers, were deemed to be unadvisable. As such, the Employment Testing department began exploring alternative options and methods for safely administering examinations. Some of the options explored include computer-based tests that can be administered and proctored by staff members from remote locations to candidates in their homes, as well as using large auditoriums to administer written tests to candidates in socially-distanced seating. During 2020, the only test administered by the Board was for the job of Firefighter. Testing operations are expected to return to a mixture of in-person and remote testing in 2021.

Leeds,  
Alabama

  
**LEEDS BENCHMARKS  
IN HISTORY**  
(Settled circa 1818-1820); (Incorporated 1887)

The War of 1812, geography, geology, and three cultures shaped the history of Leeds. Lying at the crossroads of ancient Indian paths in the center of Alabama, Leeds drew European, Cherokee, and African-American settlers to a land of fertile growing seasons and rich sources of coal and mineral ore. The early settlers built churches and schools and left the influence of Cedar Grove, Oak Ridge, Ohanateese, and Mt. Pleasant abundantly evident in current Leeds. The principal survey of Leeds was entered into Jefferson County Map Book 10, page 21, in 1808. The settlement, dating to 1818 and incorporating in 1887 as Leeds, has existed along the banks of the Little Cahaba River, beside an historic stagecoach road, and along two live railroads for the larger part of American history.  
(Continued on other side)

ERECTED BY THE ALABAMA TOURISM DEPARTMENT AND THE CITY OF LEEDS  
SEPTEMBER 2010



# Training & Organizational Development

The Personnel Board is committed to the betterment of Merit System employee performance and their service to our communities. Training & Organizational Development provides a variety of opportunities for employees to develop their personal and professional knowledge, skills, and abilities through a wide array of course offerings. This department provides certificate programs (Leading People, Managing Processes, Professional Development, and Civil Servant Leadership) comprised of over 50 courses in both technical and non-technical fields for Merit System employees, as well as specialized course offerings targeted at specific needs of our Merit System agencies and executive level programs designed to improve the leadership attributes of our upper level managers and leaders.

The Personnel Board designed and built the professional development certificate programs around the needs of Merit System employees and agencies. The goal of these certificate programs is to assist in producing competent, complete leaders in the public sector — employees who not only have the ability to lead individuals, but also manage high level projects; individuals who understand their own developmental needs and can strategically position themselves to succeed and advance in the workforce; and individuals who have the skills to thrive in today's technologically driven society. The four individual certificate programs are designed to be stand alone, yet complementary. Individuals who complete all four programs are awarded the distinction of a 360° Leader. The four components include:

**Leading People** - The Leading People certificate is a 49 hour program designed to share skills needed to assist today's managers in developing, motivating, and leading their employees. Topics include coaching, giving feedback, change management, delegating, and more.

**Managing Processes** - The Managing Processes certificate is designed to strengthen a supervisor's ability to handle the process side of management. By focusing on skills like Strategic Planning, Project Management, Creative Problem Solving, Effective Meetings, and Critical Thinking, this 49 contact hour program enables participants to gain practical skills that can be applied immediately to improve their work environment.

**Professional Development** - The Professional Development certificate is a 49 contact hour program designed to equip today's Merit System employees with the professional and business skills needed to be successful in the workplace and to further their careers within the Merit System and beyond. Topics include personal branding, business writing, time management and more.

**Civil Servant Leadership** - Employees are eligible for the Civil Servant Leadership certificate program if they have completed the other three programs listed above, serving as the capstone certificate for The 360 Degree Leader Program. This cohort-based learning program lasts 16 weeks and focuses on developing servant leadership skills through classroom-based learning, e-learning, assigned readings, group discussions, a service project, and a final presentation.





Tarrant,  
Alabama



Hueytown,  
Alabama

# Service Modifications & Enhancements

The Personnel Board continuously seeks to find better and more efficient ways of providing services to our Merit System employees and the 2020 calendar year was certainly no exception. Due to the COVID-19 pandemic, the Personnel Board had to critically evaluate all of its operations to ensure that such services could be provided in a safe manner consistent with public health guidelines. This evaluation led to many operational changes across many of the Personnel Board departments and services. Presented below are summaries of many of the more substantive changes undertaken by the Personnel Board in 2020.

## Development of Public Health Policy and Operational Plan

During this COVID-19 pandemic, the Personnel Board of Jefferson County has worked conscientiously to provide necessary services to the nearly 8000 employees within the 22 Merit System municipalities and government agencies while also ensuring the health and safety of our employees. To this end, the Personnel Board made substantive efforts to promote the health and safety of our employees and the community by strictly adhering to and promoting public health guidelines.

The 2020 year brought on unprecedented challenges to organizations across the world, and the Personnel Board was certainly no exception. When faced with the reality of a global pandemic, leadership at the Personnel Board acted quickly and diligently to pivot the organization and ensure that it could continue to effectively meet the needs of the Merit System agencies in spite of the public health challenges. One of the first actions in which the Personnel Board engaged was in the development and adoption of a comprehensive policy to guide the organization and its employees in a manner that ensures continuity of operations and minimizes threats to employee well-being during times of public health/safety crises. The policy provides general guidelines and outlines decision making discretion intended to ensure that operations can be modified in a manner to align with public health and safety recommendations made by local, state, and/or national public health/safety agencies as deemed appropriate by the Director to protect the health and safety of employees and the community, while also ensuring that critical services to Merit System agencies are maintained.

To supplement the adopted policy, the Personnel Board also developed a comprehensive operational plan that addressed the manner in which the organization and its employees would operate during the pandemic. The operations plan outlined allowable activities during the public health crisis, services that would be modified or altered to ensure safety of employees, requirements for use of appropriate personal protective equipment, and actions to take if employees were exposed or potentially exposed to the virus, among many other aspects of the Board's operations. This operational plan helped to allow the Personnel Board to effectively manage the public health risks and concerns while still meeting the needs of our member agencies.

The Personnel Board also conducted a thorough review of its operations and services and identified a number of supplies, equipment, and resources needed to help ensure effective operations during the pandemic and developed an extensive proposal to acquire funds through the Coronavirus Relief Funds to purchase these needed resources at no expense to our member agencies.



Birmingham,  
Alabama

## Service Modifications & Enhancements (continued)

### Employee Relations Administrative Hearings

During the public health crisis of 2020, the Personnel Board ceased in-person administrative disciplinary appeal hearings for several months in order to ensure the health and safety of our employees and the general public. Due to the critical nature of the disciplinary appeal hearings, the Board felt it was essential to develop a process to allow hearings to be conducted virtually, so as not to cause undue delays in critical employment decisions and the resolution of contested matters. The Employee Relations department critically evaluated the ability to conduct the administrative hearings virtually and developed extensive procedures and trainings for hearing officers and participating attorneys to ensure effective implementation of a virtual hearing process.

The virtual hearing process was developed taking into account Administrative Orders issued in the Judicial Circuit Courts in the State of Alabama and included a blend of on site and virtual participation. During the virtual hearing, the Hearing Officer, a Personnel Board Employee Relations Representative and an additional Personnel Board employee acting as a Zoom (virtual platform) adviser, are located physically within the Personnel Board Hearing Room. For the on-site participants, the Personnel Board follows CDC guidelines to ensure appropriate social distancing and sanitation and hygiene procedures. Representatives for the complainant, representatives for the respondent, and the witnesses participate remotely via Zoom.

In an effort to ensure that the foundational aspects of the hearing process remained unchanged, the Board developed a Supplement to the Appeal Procedures that fully detailed the virtual format, offered training on the virtual process and the Zoom platform, and had multiple communications with all involved in the virtual hearing process. The Personnel Board began conducting its virtual disciplinary appeal hearing process in September and continued this process throughout the remainder of the year and into 2021. The hearings remained open virtually to interested individuals and the public. We are pleased to report that during 2020, the Personnel Board successfully held nine disciplinary appeal hearings through this virtual process with little or no technical difficulties.

### Performance Management

During 2020, the Personnel Board began the implementation of Workday Talent and Performance to provide a platform for effective and productive evaluation of Merit System employee performance. Within today's work environment, talent and performance management strategies need to be flexible, not only to manage talent transactions but also to provide insights that help drive critical organizational decisions. Workday Talent and Performance incorporates employee data into a single system, providing the basis for job-related, competency-based performance assessment, targeted development plans, and alignment of individual and organizational goals.

By leveraging Workday Talent and Performance, the Personnel Board can provide Merit System agencies the flexibility to configure core organizational competencies along with job-analysis driven competencies to ensure that employees are evaluated in areas that are important for their job and organizational functioning.

Jefferson County  
Department of Health



## Service Modifications & Enhancements (continued)

### Performance Management (continued)

In 2020, Workday was configured for implementation and rollout to the Jefferson County Department of Health (JCDH). To ensure a smooth and effective implementation, the Personnel Board worked closely with JCDH Human Resources to configure the system to the desires and needs of the organization. Personnel Board Training & Organizational Development designed a training program to accompany the implementation to ensure that JCDH managers understood how to effectively evaluate employee performance using a competency-based approach and could effectively navigate the Workday system to enter and approve employee appraisals. Each JCDH manager participated in a full-day training and was provided with take-away training manuals and resources to help cement the learning of the presented material.

The Personnel Board is excited about this significant enhancement in our service to Merit System agencies and will continue in the coming year to roll out this system and training to additional agencies.

### Job Analysis

The Personnel Board engages in extensive job analysis activities to help appropriately drive human resources related initiatives to include, but not be limited to, employee selection, position classification, employee development, and performance management. Job analysis data is shared with Jefferson County and other Merit System agencies, where needed, to assist in supporting their human resources efforts (e.g., employment selection). Conducting these job analysis activities involves heavy input from subject matter experts (SMEs) from across all Merit System agencies and all types of positions. This input is traditionally provided through onsite interviews and in-person focus groups where Personnel Board staff facilitate input and information sharing by these SMEs to help promote a thorough and comprehensive job study. Conducting these meetings in this manner under the public health crisis created potentially unsafe exposure among the SMEs when engaged in these face-to-face activities. Thus, the Personnel Board sought to limit the need for face-to-face interactions of SMEs across all agencies by facilitating the information sharing and gathering through remote/virtual means. The Personnel Board leveraged funding through the Coronavirus Relief Fund to acquire equipment and licenses to allow for the effective gathering, collecting, and sharing of data, information, and documents in a manner that promoted and helped ensure the safety and well-being of the employees. Employment Testing developed revised protocols to help ensure that staff could facilitate meetings and discussion appropriately and effectively through Zoom. Using these virtual job analysis protocols, Employment Testing was able to ensure that all job analyses scheduled within the 2020 calendar year were completed on time and within the schedule needed for the annual classification survey.

Jefferson County  
General Retirement System



Jefferson County  
Commission

Jefferson County  
Sheriff's Office



Jefferson County  
Emergency Management

## Service Modifications & Enhancements (continued)

### Training & Organizational Development

All in-person training programs were suspended in March, 2020 for the remainder of the calendar year to help ensure the health and safety of our Merit System employees and communities. Despite the inability to conduct training in the “traditional” face-to-face model, Training & Organizational Development worked to develop new ways to design and deliver employee development opportunities to Merit System Employees safely and securely.

Early within the pandemic, the Personnel Board quickly realized a need for training sessions related to the realities being faced across the Merit System due to the pandemic. In response, over 15 Lunchtime Learning Blasts sessions were developed to address a number of those needs. These sessions were presented on Facebook Live in order to share the content as quickly and efficiently as possible. Topics included ways to be productive when working from home, terminology to avoid in a crisis, how to be an effective remote worker, and taking care of your mental health, among others. Due to the high number of viewers, training will continue to host these at least twice per month on topics that align with the needs of the Merit System employees.

Because the training course curriculum (outlined on page 33) was not able to be presented in the traditional setting during much of 2020, Training & Organizational Development sought to transition the vast majority of these courses to virtual instructor-led training (VILT) sessions hosted by a live trainer and supported by a producer. These sessions are live, dynamic and engaging, and are comprised of interactive communication, group activities and more. Over 90% of our training programs were converted to VILT, with attendance averaging 24 employees per session.

To support learning in a remote or virtual capacity, the Personnel Board also developed Trainer Talks — live, monthly interactive sessions hosted by members of the Training team. Topics were identified that affect our Merit System employees, such as networking, feedback processes, and more. By providing these sessions live on our Facebook page, we have seen our Facebook followers increase by more than 30% over the past year. Training & Organizational Development, recorded all lunchtime learning blasts, trainer talks, and other sessions, and placed them on our Merit Matters website for viewing at the convenience and leisure of our Merit System employees. Over 40 recorded learning events are now available for Merit System employees to watch, learn, and grow on their own time and at their own pace.

### Supervisory Organizations

Throughout 2020, the Personnel Board worked with Merit System agencies to implement full organizational structuring within the Workday system. Personnel Board staff contacted and met with payroll coordinators, human resource managers, and department heads to gather information on employee-supervisor reporting structures and worked with each agency’s personnel action processing staff to incorporate those reporting structures into Workday supervisory organizations. These supervisory organizations allow each agency to produce full organizational charts, improve efficiency of position establishment and tracking, and allow for implementation of performance management within Workday.

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