2019 Human Resources Director Goals

Strategic Plan
- Ensure the accomplishment of 2019 action plans related to the 2018-2020 Human Resources Strategic Plan

Stakeholder Service and Relationships
- Advance a culture of customer service excellence for the Human Resources (HR) Department
  - Develop and communicate service standards to stakeholders
  - Provide development opportunities and ensure clear service expectations for HR staff
  - Assess customer satisfaction across the department
  - Reward and recognize staff for demonstrating excellent customer service
  - Learn and apply Florida Sterling Council Criteria for Performance Excellence
- Enhance engagement and trust with affected stakeholders, with particular attention to clarifying roles, managing expectations, and managing change
  - Confirm expectations of stakeholders, particularly Appointing Authorities, Employees’ Advisory Council, and Personnel Board; manage competing interests through the formal adoption and communication of priorities for HR resources
  - Enhance stakeholder engagement and communication by providing regular opportunities for feedback and dialogue

  **Merit pay discussions with the Appointing Authorities on 5/14 (see attached) and Employees’ Advisory Council Delegates on 5/23 (see attached)**
  - Apply best practices for change management and ensure appropriate vetting with stakeholders when implementing new programs or changes to current programs
  - Attend at least 75% of EAC Representative and Delegate Meetings to cultivate effective communication and trust between employees and HR
  - Meet individually with each Appointing Authority at least twice annually to foster effective working relationships, understand service needs, and solicit feedback
  - Meet individually with each Personnel Board member at least twice annually to provide updates and receive guidance

Communication and Outreach
- Solicit perspectives from employees regarding effective communication strategies; implement communication approach aligned with employee feedback
- Grow paid and unpaid internship opportunities – Limit to interested Appointing Authorities

HRIS and Records Administration
- Implement further Taleo upgrades and enhancements for FACE and Recruitment modules
  - Introduce onboarding module
  - Implement single sign-on and optimized applicant and employee experience
  - Implement FACE enhancements, including customizable review templates
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- Enhance decision support services for Appointing Authorities through more robust dashboards, key performance indicators (KPI’s) and other workforce reports from Human Resources

- Partner with Human Rights to offer ethnicity reporting, create instructional guide “How to Self-Report My Ethnicity in OPUS” and provide an article in The Pen

**Organizational and Talent Development**
- Work with UPS leadership to cultivate diverse and inclusive work environments
- Provide development programs for managers focused on facilitating welcoming and inclusive work environments

**Planning and Performance**
- Prepare UPS for possible FY20 merit pay program implementation, including development of process and tools
  - Work with Appointing Authorities and the EAC on the development of an Employee Value Proposition (EVP) for the Unified Personnel System, with specific focus on cash compensation, benefits and rewards
  - Performance management – Expand supervisor development in conducting meaningful performance assessments that align with organizational strategic goals
- Complete 2019 Employee Voice Survey – Goal of 75% participation rate

**Total Rewards**
- Implement Phase II of the Classification and Compensation Study
  - Work with Appointing Authorities and Personnel Board to establish new Exempt classifications
    - Pursuing Phase II process as discussed with the Appointing Authorities on 5/14 (see attached)
  - Work with affected stakeholders to update the BCC Exempt pay plan
  - Implement method for awarding in-range pay adjustments to recognize employee career growth and development
- Design and implement employee education campaign around the value/competitiveness of benefits and how various programs work
- Provide each employee with a customized Total Compensation Statement

**Workforce Strategy**
- Further implement strategies to attract applicants from underrepresented populations
- Continue to enhance the hiring process to evaluate vacancies across the organization for current and future needs, and identify competencies needed for the positions

June 6, 2019 Attachments:
- A. Merit Pay Discussion Appointing Authorities Meeting 5/14/19
- B. EAC Delegate Meeting Merit Pay Straw Poll
- C. Proposed Implementation Strategy and Timeline for Classification and Compensation Study Phase II
Merit Pay Discussion
Appointing Authority Meeting 5/14/19

Goal: Build Alignment on Direction for Merit Pay Process

A. Purpose and objectives
- Motivate employees to perform at a high level?
- Improve morale?
- Help employees progress faster through the pay range?
- Show appreciation for outstanding performance?
- Other?

B. Funding considerations
- Current market trend is around 3% salary increase
- Appropriate mix between general increase and merit increase
  - General increase is calculated as percentage of midpoint
  - Merit increase is calculated as percentage of actual pay rate
- Alternatives to base pay increase:
  - Paid leave – Five days of paid leave is equivalent to 2% of annual salary
  - One-time lump sum (subject to compliance with FL statute 215.425)

C. Example Timeline
- July 2019 – Employee focus groups; feedback on merit pay models
- September 2019 – Finalize and communicate merit pay plan for FY20
- September/October 2019 – Leadership communicates priorities and objectives for the organization
- July – November 2019 – Supervisor development programs re effective performance reviews
- October/November 2019 – Employees collaborate with their managers to set performance plan and goals linked to organizational objectives
- December 2019 – July 2020 – Regular performance check-ins between employees and managers
- July 2020 – Managers complete preliminary performance rating form
- August 2020 – Calibration committees review preliminary forms and make recommendations for adjustments
- September 2020 – Final performance ratings shared with employees
- September 2020 – Merit increases awarded
- October/November 2020 – Departments respond to employee grievances
- January/February 2021 – Merit pay system is evaluated and adjustments made
D. Roles and responsibilities

- Appointing Authorities
  - Actively contribute to the planning process for UPS merit pay program
  - Propose/adopt funding arrangements for general increase and merit increase
  - Communicate organizational expectations, priorities and objectives
  - Ensure all supervisors participate in learning sessions for completing effective performance reviews
  - Hold managers accountable for completing constructive and honest assessments of employee performance
  - Identify individuals for calibration committees
  - Communicate the adopted process to employees to facilitate understanding and manage expectations

- Supervisors
  - Participate in learning sessions for completing effective performance reviews
  - Work with direct reports to establish performance plan and goals, making adjustments during the year if warranted
  - Complete and document regular check-ins with employees to convey employee’s progress
  - Provide support for areas of performance deficiency

- Calibration committee (or higher level reviewer)
  - Review and approve employee performance plans/goals
  - Review and approve proposed performance ratings to ensure that different supervisors apply similar standards in measuring and evaluating performance

- Employee
  - Work with supervisor to develop performance plan and goals
  - Fully participate in performance check-ins by identifying accomplishments and challenges
  - Ensure understanding of expectations for meeting and exceeding performance goals

- Human Resources
  - Ensure learning programs are provided for supervisors re completing effective and honest performance reviews
  - Lead employee focus groups to obtain feedback on proposed merit pay models
  - Provide instructions and forms related to the process
  - Process merit pay adjustments as approved by Appointing Authorities
E. Keys to success
- Common understanding of purpose for merit pay
- Establishment of clear performance standards and measures linked to organization’s strategic goals
- Culture of regular performance-related conversations
- Culture of trust between employees and management
- Leadership is willing to have candid and tough conversations with employees
- Accountability for supervisors to assess and document performance constructively and honestly
- Leadership team involvement in calibrating performance ratings across supervisory styles
- Sufficient differentiation in pay increase levels for outstanding performers
- Post-implementation assessment of process and outcomes to identify strengths and opportunities for improvement

F. Possible models
- Ratingless System – Leadership identifies a maximum percentage (i.e. 30%) of workforce to receive a merit increase; prior year reviews must support the recommendation but no rating is assigned. Calibration committee reviews recommendations prior to final determinations. Merit increase is either awarded or not awarded.
- Point-Based System – A numerical (5-point scale) rating is assigned to identified factors (i.e. quantity of work, dependability, etc.). Factors may be weighted depending on the nature of the position. The amount of merit increase is dependent on the total number of points awarded.
- Paid Leave Reward System – Provides one-time reward in contrast to base-pay models. Provides greater flexibility to employee who may use the leave as paid time off, exchange the leave for cash, or contribute the value to a deferred compensation account (Note: Exchange for cash or 457 contribution in accordance with Annual Leave Exchange policy and Appointing Authority approval).

Next steps:
- Confirm features of interest to Appointing Authorities
  - Funding for general increase vs. merit increase
  - Merit increase award method: base pay increase vs. lump sum vs. paid leave
  - Estimated percentage of employees to receive merit increase
  - Levels of merit increase (Receive or not vs. multiple levels of increase)
  - Timeline for finalizing process and awarding merit increases
- Put together team to further develop details:
  - Human Resources
  - County Attorney’s Office
  - Appointing Authority representatives
  - Payroll
  - Office of Management and Budget (OMB)
  - Employees’ Advisory Council (EAC)
Results by Question

1. An ideal process will result in ___% of employees receiving a merit increase? (Multiple Choice)

<table>
<thead>
<tr>
<th>Responses</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer than 25%</td>
<td>13.33%</td>
<td>8</td>
</tr>
<tr>
<td>25-50%</td>
<td>30%</td>
<td>18</td>
</tr>
<tr>
<td>50-75%</td>
<td>28.33%</td>
<td>17</td>
</tr>
<tr>
<td>75-95%</td>
<td>28.33%</td>
<td>17</td>
</tr>
<tr>
<td>Totals</td>
<td>100%</td>
<td>60</td>
</tr>
</tbody>
</table>

2. To be meaningful, a merit increase should be at least ___% of base salary? (Multiple Choice)

<table>
<thead>
<tr>
<th>Responses</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2%</td>
<td>0%</td>
<td>0</td>
</tr>
<tr>
<td>2-3%</td>
<td>23.33%</td>
<td>14</td>
</tr>
<tr>
<td>3-4%</td>
<td>45%</td>
<td>27</td>
</tr>
<tr>
<td>4-5%</td>
<td>31.67%</td>
<td>19</td>
</tr>
<tr>
<td>Totals</td>
<td>100%</td>
<td>60</td>
</tr>
</tbody>
</table>
3. A successful merit pay program implementation is the primary responsibility of: (Multiple Choice)

<table>
<thead>
<tr>
<th>Responses</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resources</td>
<td>27.87%</td>
<td>17</td>
</tr>
<tr>
<td>EAC</td>
<td>3.28%</td>
<td>2</td>
</tr>
<tr>
<td>Personnel Board</td>
<td>9.84%</td>
<td>6</td>
</tr>
<tr>
<td>All Appointing Authorities</td>
<td>52.46%</td>
<td>32</td>
</tr>
<tr>
<td>Other</td>
<td>6.56%</td>
<td>4</td>
</tr>
<tr>
<td>Totals</td>
<td>100%</td>
<td>61</td>
</tr>
</tbody>
</table>

4. My supervisor is ____ when it comes to fairly, honestly, and constructively evaluating my performance. (Multiple Choice)

<table>
<thead>
<tr>
<th>Responses</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very effective</td>
<td>41.67%</td>
<td>25</td>
</tr>
<tr>
<td>Somewhat effective</td>
<td>31.67%</td>
<td>19</td>
</tr>
<tr>
<td>Not at all effective</td>
<td>6.67%</td>
<td>4</td>
</tr>
<tr>
<td>Don’t know — he/she has not evaluated my performance</td>
<td>20%</td>
<td>12</td>
</tr>
<tr>
<td>Totals</td>
<td>100%</td>
<td>60</td>
</tr>
</tbody>
</table>
5. The primary purpose of merit pay is: (Multiple Choice)

<table>
<thead>
<tr>
<th>Responses</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivate employees to perform at a high level</td>
<td>38.71%</td>
<td>24</td>
</tr>
<tr>
<td>Improve morale</td>
<td>4.84%</td>
<td>3</td>
</tr>
<tr>
<td>Helping employees progress faster through the pay range</td>
<td>4.84%</td>
<td>3</td>
</tr>
<tr>
<td>Show appreciation for outstanding performance</td>
<td>48.39%</td>
<td>30</td>
</tr>
<tr>
<td>Other</td>
<td>3.23%</td>
<td>2</td>
</tr>
<tr>
<td>Totals</td>
<td>100%</td>
<td>62</td>
</tr>
</tbody>
</table>
Objectives

- Reduce the number of unique classification titles
- Define and value job classifications that correspond to the work being done
- Provide opportunities for career paths and professional growth
- Ensure fair and competitive compensation, measured against the greater employment market
- Provide the best solution for the most employees within financial constraints

Chosen Structure

- Solution Option: Evergreen Solution 3 Moderate Consolidation
- Market Approach: Public Market

Phase II Recommendations

Phase II Implementation Priorities:

- Address Exempt classifications behind market
- Bring Exempt pay rates to new pay grade minimums
- Address range and rank compression for both Exempt and Classified employees
- Implement policies addressing career step progression

For Phase I, which focused on Classified employees, the application of pay adjustments was straightforward because all Classified employees moved from a singular pay plan into the new pay structure. Pay adjustments for Exempt employees present a challenge because they are moving from numerous, unstandardized, pay structures to new pay structures. Human Resources will work with those responsible for Exempt pay plans to identify pay adjustment strategies that work within each pay plan.

Entities with Exempt pay plans include:

1. Board of County Commissioners (covers BTS, County Attorney, County Administrator, Forward Pinellas, Human Resources, Human Rights)
2. Clerk of the Circuit Court and Comptroller
3. Property Appraiser
4. Supervisor of Elections
5. Tax Collector

Proposed Pay Adjustment Methodology

A. Address Exempt classifications behind market
B. Bring Exempt pay rates to minimum and address resulting compression
   1. Migrate employees into the new classifications and associated pay grades
   2. For Exempt employees that fall below the new pay grade minimums, adjust pay rates to the new minimum
C. Address rank compression
D. Address range compression
## Proposed Phase II Timeline for 2019

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 1 - July 5</td>
<td>Evergreen/HR develops new Exempt classification specifications</td>
</tr>
<tr>
<td><strong>May 14</strong></td>
<td><strong>Appointing Authorities meeting</strong> - Appointing Authorities discuss Phase II objectives, timeline, roles and responsibilities</td>
</tr>
<tr>
<td><strong>May 17</strong></td>
<td>Appointing Authorities using the BCC Exempt Pay Plan (excludes Constitutionals) receive updated solution files with Evergreen recommendations for Exempt positions, including cost estimates for Exempt pay adjustments</td>
</tr>
<tr>
<td>May 20 - June 10</td>
<td>Appointing Authorities may request Secondary Review of Exempt positions by Evergreen consultants</td>
</tr>
<tr>
<td>June 10 - 28</td>
<td>Evergreen meets with Appointing Authorities individually to discuss updated recommendations</td>
</tr>
<tr>
<td><strong>July 1</strong></td>
<td>Evergreen completes Secondary Review as requested by Appointing Authorities</td>
</tr>
<tr>
<td><strong>July 8</strong></td>
<td>Individual notices sent to Exempt employees regarding tentative classification/pay grade changes and pay adjustments (as applicable)</td>
</tr>
<tr>
<td><strong>July 9 - 12</strong></td>
<td>Evergreen group meetings with exempt employees to review the Secondary Review process and address questions</td>
</tr>
<tr>
<td><strong>July 9 - 22</strong></td>
<td>Exempt employees may request Secondary Review by Evergreen consultants</td>
</tr>
<tr>
<td><strong>Aug. 9</strong></td>
<td>Evergreen completes Secondary Reviews as requested by Exempt employees; recommendations shared with Appointing Authorities</td>
</tr>
<tr>
<td><strong>Aug. 19</strong></td>
<td>Exempt employees receive results of Secondary Reviews (as applicable)</td>
</tr>
<tr>
<td><strong>Sep. 2 - 13</strong></td>
<td>Exempt classification and pay data loaded in OPUS in advance of the 9/15/19 effective date</td>
</tr>
<tr>
<td><strong>Sep. 5</strong></td>
<td>Personnel Board adopts new Exempt classifications and sunsets obsolete classifications, effective September 15, 2019</td>
</tr>
<tr>
<td><strong>Sep. 12</strong></td>
<td>BCC formally adopts Exempt pay plan that incorporates UPB changes to Exempt classifications, effective September 15, 2019</td>
</tr>
<tr>
<td><strong>Sep. 15</strong></td>
<td>GO LIVE for new Exempt classifications and pay plans</td>
</tr>
<tr>
<td><strong>Sep. 15</strong></td>
<td>Effective date for Exempt classification-related pay adjustments</td>
</tr>
<tr>
<td><strong>Oct. 13</strong></td>
<td>Tentative effective date for FY20 General Increase</td>
</tr>
<tr>
<td><strong>TBD</strong></td>
<td>Individual notices sent to affected Exempt and Classified employees regarding Phase II equity adjustments</td>
</tr>
<tr>
<td><strong>TBD</strong></td>
<td>Equity adjustments for Exempt and Classified employees loaded in OPUS</td>
</tr>
<tr>
<td><strong>TBD</strong></td>
<td>Effective date for equity-related pay adjustments for Exempt and Classified employees</td>
</tr>
</tbody>
</table>

Red font indicates a regularly scheduled meeting.