Persons are advised that, if they decide to appeal any decision made at this meeting/hearing, they will need a verbatim record of the proceedings, and, for such purposes, they may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is based.

Persons with a disability needing reasonable accommodation(s) to participate in this proceeding should contact the Office of Human Rights, 400 S. Fort Harrison Ave., 5th Floor, Clearwater, FL 33756 (727) 464-4062 (V/TDD) no later than 48 hours prior to the meeting.
Clearwater, Florida, August 1, 2019

The Unified Personnel Board (UPB) met in regular session at 6:32 P.M. on this date in the County Commission Assembly Room, Fifth Floor, Pinellas County Courthouse, 315 Court Street, Clearwater, Florida, with the following members present: Ron Walker, Vice-Chair; Kenneth Peluso; Paul Rogers; and Joan M. Vecchioli.

Not Present: Ricardo Davis, Chair; Jeffrey Kronschnabl; and William A. Schulz II.

Also Present: Terri Wallace, Human Resources Manager; Carl E. Brody, Senior Assistant County Attorney; Jenny Masinovsky, Board Reporter, Deputy Clerk; and other interested individuals.

AGENDA

PLEDGE OF ALLEGIANCE

I. Citizens to be Heard

EAC

II. Employees’ Advisory Council Representative

Personnel Board

III. CONSENT AGENDA
1. Request Approval of the Minutes of the Regular Personnel Board Meeting held July 11, 2019

Personnel Board

IV. NEW BUSINESS
1. Request Approval to Return Exempt Employee Mary Flockerzi to the Classified Service
2. Discuss Proposed Changes to the Appeal Procedures (County Attorney)

Human Resources

V. INFORMATIONAL ITEMS
1. Action Taken Under Authority Delegated by the Personnel Board
2. Other Informational Items

Human Resources

VI. HR HIGHLIGHTS
1. Contracts/Budget Administration

All documents provided to the Clerk’s Office have been made a part of the record.
CALL TO ORDER

Vice-Chair Walker called the meeting to order at 6:32 P.M.; whereupon, he led the Pledge of Allegiance.

CITIZENS TO BE HEARD

No one appeared in response to the Vice-Chair’s call for citizens wishing to be heard.

EMPLOYEES’ ADVISORY COUNCIL (EAC) REPRESENTATIVE

EAC Representative Charles Toney provided the following update regarding the July 25 EAC Delegate meeting:

- Ken Burke, Clerk of the Circuit Court and Comptroller, highlighted the important role of the EAC in bringing forth concerns of the employees and communicating with the Appointing Authorities.

- Canaan McCaslin, Special Assistant to the County Administrator, presented information on the Lunch Pals mentoring program and workshop.

- Robert Allen, HCP Associates, discussed the importance of the upcoming bi-annual Employee Voice Survey measuring employee satisfaction, which will be conducted by HCP Associates and run for two weeks, starting on August 12.

Mr. Toney indicated that at the July UPB meeting, EAC Chair Lisa Arispe informed the members that he and she had been accused of violating the County’s anti-bullying policy; and that following an investigation completed by a Human Resources (HR) representative from the Tax Collector’s Office, Mr. Burke and County Administrator Barry Burton delivered a written opinion on the matter, stating that no conclusive evidence of a violation was found and no further action is necessary; whereupon, Mr. Toney offered to provide copies of the same to the members.

During discussion of the County’s anti-bullying policy scope, purpose, and background, and responding to queries by Ms. Vecchioli and Mr. Toney, Attorney Brody indicated that the policy is broad and includes forums such as the EAC; and that personal information pertaining to anti-bullying matters is not exempt from public records. Mr. Toney noted that while the nature of
concerns brought to the EAC may often trigger heated or uncomfortable discussions, opinions of all are welcome and no one is singled-out; that there is no opportunity for retaliation; and that the aforementioned incident was finalized.

Noting that she was opposed to instituting the policy, Ms. Vecchioli expressed concern that it may deter participation on the EAC and similar activities, reiterating that the policy language should be reviewed to ensure the Board’s intent, and Attorney Brody and Mr. Toney agreed. Vice-Chair Walker opined that heated discussions should be expected and protected at meetings of informal legislative bodies such as the EAC.

Ms. Wallace discussed the importance of preserving the policy, noting that 95 percent of performance problems, including those in the County, are based on behavioral and interpersonal issues; that it is necessary to clarify behavioral expectations and educate the organization on the type of conduct that is and is not allowed under the anti-bullying policy; and that while it may be abused like any law, having it in place provides a healthier working environment. Mr. Toney pointed out that the EAC originally requested the policy implementation based on employees’ concerns; whereupon, he remarked that he and Ms. Arispe feel targeted by the HR Department, given that two unfounded accusations, the latest being the bullying accusation, in which HR was involved have been brought against them in seven months; that it is causing stress and disruption of work; and that the trust between the EAC and HR has deteriorated.

Mr. Toney related that a Merit Pay Committee formed by the EAC, with the participation of the HR Department and the Appointing Authorities, conducted extensive research on merit pay; and that the Committee presented its recommendation to adopt a merit pay system previously used by the County at the joint meeting with the Appointing Authorities on May 14; whereupon, he questioned why HR representatives brought forth new information about other merit pay options at that time that had not been mentioned during the 10-month course of the Committee’s work.

Mr. Toney related that the EAC has completed and voted to approve the revisions to its bylaws, indicating that an article relating to the HR Director’s annual evaluation timeframe was added. He noted that the bylaws currently require Personnel Board approval for any revisions, and asked if the Board wishes to limit that to statutorily required approval of the matters relating to EAC member composition only, and discussion ensued. Ms. Vecchioli pointed out that while the revised bylaws are included in the agenda packet, the item is informational, and requested to see the statute prior to voting on the revisions, and Mr. Toney agreed to provide it.
CONSENT AGENDA – APPROVED

Upon motion by Mr. Rogers, seconded by Ms. Vecchioli and carried unanimously, the minutes of the regular meeting held July 11, 2019 were approved.

NEW BUSINESS

Request to Return to Classified Service – Approved

Ms. Wallace introduced the item and addressed queries by the members; whereupon, Ms. Vecchioli moved, seconded by Mr. Peluso and carried unanimously, that the request by exempt employee Mary Flockerzi to be demoted to the classified position of an HR Analyst be approved.

Proposed Changes to Appeal Procedures

Attorney Brody referred to the draft procedures included in the agenda packet and reviewed the options proposed to clarify language inconsistencies identified at last month’s hearing of classification appeals, and discussion ensued.

Ms. Vecchioli explained that under Option 1, the Board would review the evidence presented and considered during the informal hearing process before the HR Director that precedes an appeal hearing; and that Option 2 would allow the Board to review additional evidence submitted thereafter, noting that under both options, the Board would decide whether the appellant, by the preponderance of the evidence, has shown that the action taken by the Director should be changed. Responding to query by Mr. Peluso, Attorney Brody stated that currently the Board may exercise both options.

Mr. Peluso moved, seconded by Ms. Vecchioli, that Option 1 be adopted by the Board for its classification appeal procedures, and discussion ensued regarding opportunities to provide new evidence after the deadline, adherence to the process, circumstances of the last classification appeal, and the preponderance of the evidence standard, and Human Resources Officer Jack Loring and Attorney Brody provided input.

Upon call for the vote, the motion carried unanimously.
INFORMATIONAL ITEMS

Action Taken Under Authority Delegated by the Personnel Board

The document titled Action Taken Under Authority Delegated by the Unified Personnel Board has been made a part of the record.

Classification and Compensation Study Update

Mr. Loring reported that the recommended changes to exempt positions are being implemented based on Phase II of the study by Evergreen Solutions; that 547 employees will be notified by email tomorrow regarding preliminary recommendations concerning job classifications and pay grades; and that final results are expected in September, following an optional secondary review by Evergreen.

Noting that the Board has the authority to establish and change exempt classifications, Mr. Loring indicated that a classification crosswalk will be brought to the Board for consideration next month; and that the proposed new fiscal year adjustments to minimums and maximums for the classified plan will also be included on the next meeting’s agenda.

In response to queries by Ms. Vecchioli and Mr. Peluso, Mr. Loring and Ms. Wallace related that Evergreen recommended looking into merit pay options; and that HR Director Holly Schoenherr expressed opposition to merit pay, but offered support to any Appointing Authorities opting to utilize it; whereupon, at their request, HR has developed and will be evaluating a merit pay plan, including establishing tighter controls around performance management, noting that if approved, it would be implemented in October of 2020.

Other Informational Items

The minutes of the EAC Representative meeting of June 19, 2019 were received for filing.

HR HIGHLIGHTS

Contracts/Budget Administration

Contract Administration Coordinator Danielle Holland referred to a PowerPoint presentation titled Human Resources Contract Administration and Budget Overview and discussed the purpose and goals of the Contract Administration initiative, including streamlining of contract processes to
ensure alignment with the HR strategic plan and monitoring vendor performance to promote customer service; whereupon, she discussed her responsibilities in ensuring the HR Department’s budgetary soundness.

ADJOURNMENT

There being no further business, Vice-Chair Walker adjourned the meeting at 7:33 P.M.

____________________________________
Chair
MEMORANDUM

TO: The Honorable Chair and Members of the Unified Personnel Board
FROM: Lisa Arispe, Chair – Employees’ Advisory Council
RE: Employees’ Advisory Council – By-Laws Revisions
DATE: August 22, 2019

Recommendation

Request approval of the Employees’ Advisory Council (EAC) revisions to their By-Laws to include the annual evaluation of the Human Resources Director and other formatting changes.

Recommended changes include:

- Addition of wording regarding the Council’s annual evaluation of the Director of Human Resources with time frame and submittal.
- Clarification on Article X Amendments of the current EAC By-Laws in regard to the two week notifications prior to changes and approval of the changes by the Personnel Board.
- Reformatting of the By-Laws for better flow of similar information.

Background:

These changes are being brought to the Personnel Board per Article X of the current EAC By-Laws which requires Personnel Board Approval.

Attachments:

- EAC By-Laws – lined version showing additions and changes.
- EAC By-Laws – clean version with updates incorporated.
BYLAWS OF
EMPLOYEES' ADVISORY COUNCIL
TO THE PERSONNEL BOARD OF THE PINELLAS COUNTY
UNIFIED PERSONNEL SYSTEM

2019 Changes (showing changes)

Article I

NAME

This body shall be known as the Employees' Advisory Council to the Personnel Board of the Pinellas County Unified Personnel System, hereinafter called the Council or EAC.

Article II

STATEMENT OF PURPOSES AND OBJECTIVES

Section 1 - The express purpose of the Employees' Advisory Council, acting as a representative body of all classified employees, shall be to serve in an advisory capacity to the Personnel Board, management and their fellow employees.

Section 2 - To improve understanding between management and employees, the Council shall render assistance both to management and their fellow employees.

1. Members of the Council are urged to assist in resolving problems between employees and management where such assistance would not interfere or interrupt the general procedures set forth in the rules dealing with such matters.

2. Where there is evidence of unjust or unnecessary treatment involving a group of employees, the Council shall investigate and attempt to resolve the matter with those parties involved.

3. When conditions warrant, and with the approval by the Council, the Appointing Authorities may be invited to any Council meeting for discussion of mutual problems or information sharing. In addition to any such meeting, informal discussion between the Appointing Authorities and the Advisory Council are encouraged.

Section 3 - The Council is charged with developing and recommending ideas related to working conditions, morale, public image, efficiency, employee safety, employee insurance programs, and other employee related benefits.
Section 4 - The duties of the Council members shall be to transact all business brought before the Council for said Council's disposition. *(moved from Article V Sec.3)*

Section 4 5 - Furthermore, no member of the Council shall use it as a means for personal or political gain, nor shall the Council as a whole take part in any movement not in keeping with the real purpose and objective of the Council. *(moved from Article II Sec.4)*

Article IV III *(moved from Article IV)*

MEETINGS

Section 1 - MEETINGS: Normally there shall be regular monthly meetings of this Council on the third (3rd) Wednesday of each month. Said meetings to be held at 2:30 p.m. at a designated location.

Section 2 - SPECIAL MEETINGS: Special meetings may be held at the call of the Chairperson or Vice Chairperson, by the request of at least eight (8) members of the Council, or by the Director of Human Resources.

Section 3 - NOTICE: Normally at least three (3) days’ notice of each special meeting shall be furnished to each member of the Council.

Section 4 - ORDER OF BUSINESS: The order of business at regular meetings shall be:

1. Call to Order
2. Roll Call and Introduction of Guests
3. Approve Minutes of Previous Meeting
4. Committee Reports
5. Old Business (unresolved issues)
6. New Business (issues brought up for the first time)
7. Adjournment

Section 5 - QUORUM: Eight (8) of the members constitute a quorum for the transaction of business.

Section 6 - VOTING: Every member of the Council shall have the right and be entitled to one vote, in person, upon every proposal properly submitted to vote at any meeting. Council members may vote on an individual proposal by Proxy by sending an email to the Chair with the Proxy’s name prior to voting.

Article IX

Section 7 - RULES OF ORDER *(moved from Article IX)*

"Robert's Rules of Order" shall be the parliamentary authority utilized as a guideline for all matters of procedure not specifically covered by these Bylaws.
Section 8 - HUMAN RESOURCES DEPARTMENT’S ROLE: In addition to the duly elected members of the Council, The Director of Human Resources or his/her designee shall act in an advisory and liaison capacity to the Council. (moved from Article V)

Article V  Article IV (moved from Article V)

COUNCIL COMPOSITION MEMBERSHIP

Section 1 – MEMBERS: Membership of this Council shall consist of fifteen (15) members.

Section 2 – COUNCIL COMPOSITION: The Council shall be composed of fifteen (15) members to be apportioned as follows:

- Tax Collector - One (1) Member
- Clerk of the Circuit Court - Two (2) Members
- Property Appraiser - One (1) Member
- Supervisor of Elections - One (1) Member
- Other Appointing Authorities - One (1) Member
- Board of County Commissioners - Eight (8) Members
- Representative At Large - One (1) Member

TOTAL EAC MEMBERS - Fifteen (15) Members

One Council member shall be elected from each of the following Groups:

1. TAX COLLECTOR
2. CLERK OF CIRCUIT COURT GROUP 1 - NORTH COUNTY
3. CLERK OF CIRCUIT COURT GROUP 2 - SOUTH COUNTY
4. PROPERTY APPRAISER
5. SUPERVISOR OF ELECTIONS
6. OTHER APPOINTING AUTHORITIES (Representing: County Attorney, Office of Human Rights, Human Resources, Forward Pinellas, Business Technology Services)
7. BOARD OF COUNTY COMMISSIONERS - 1 from each of 8 Groups

Council Member selected by Appointment:

1. REPRESENTATIVE AT LARGE – appointed by a quorum of the 14 Elected Council Members
Section 3 - GROUP COMPOSITION: The Council shall establish the composition of each Representative Group according to geographical, organizational and numerical considerations, in a manner that will best serve the established purposes and objectives of the Council.

Section 4 - TERM: Council members shall serve two (2) year terms. The commencement of each term shall be staggered so that no more than eight (8) of the Council seats will need to be filled through a regular election at one time.

Section 5 - QUALIFICATIONS: The members shall have been employed for at least one year by Pinellas County as a permanent employee of the classified service.

Section 6 - POWERS TO ELECT OFFICERS: The Council, at their December meeting each year, shall elect a Chairperson, a Vice Chairperson, and a Secretary. These officers will take office at the first scheduled meeting in January. (from Article V Sec.4)

Section 7 - REMOVAL OF OFFICERS AND/OR MEMBERS: Any officer and/or member may be removed by the Council whenever, in the judgment of the Council, the best interest of the Council will be served thereby, by a two thirds (2/3) vote of the Council, after two (2) weeks notice and reason for removal to the members of the Council and the Human Resources Director. Members missing three (3) consecutive monthly meetings or six (6) meetings over a twelve (12) month period shall have a review by the Council with the possible action of removal. (from Article V Sec.5)

Article V

ELECTION PROCESS (from Article V Sec.7)

Section 7 1 – Election Process: It shall be the responsibility of the Employees' Advisory Council to establish, with the approval of the Personnel Board, the electoral process for all parties elected to said Council and for classified service employees within the Unified Personnel System aspiring to be elected to the Council. (from Article V Sec.7)

Section 2 – Elections Committee: The Council shall appoint an Elections Committee to oversee this election process including the responsibility of supervising the Primary and the General Elections. The Elections Committee shall consist of three council members not up for re-election. It shall be the Elections Committee's responsibility to oversee the voting process as well as addressing and investigating any irregularities in the campaign, nomination and voting processes and referring them to the Council for disposition. (from Article V Sec.7)

Section 3 - Election Policy: The Elections Committee shall conduct each election annually in accordance with the policies and procedures approved by the Employees' Advisory Council each year. The policies and procedures shall be approved by the Employees' Advisory Council no later than the July meeting. (from Article V Sec.7)
Section 9 – Election Review Request: A classified employee who believes that inappropriate activities, such as violation of campaign rules, voter fraud, voter coercion, etc., have significantly affected a primary or general election, may file a written complaint to the Elections committee, which shall investigate the matter and present a report to the chairperson. If, in its report, the Elections Committee finds merit in the complaint, the chairperson shall schedule a meeting, within ten working days, for the entire Council, during which it shall review the Elections Committee report and consider what action to take regarding the situation. After considering the evidence presented, and the greater good to all concerned, the Council, with the support of two-thirds vote of those voting, may require a new election in the EAC group(s) affected. (from Article V Sec.9)

Article VI

AT LARGE REPRESENTATIVE

The At Large Representative shall be appointed by a quorum of the other 14 representatives on the Council following the election of officers. This representative shall serve for a two-year term and is eligible for reappointment by a quorum vote of the Council at the end of each two-year term. This representative shall meet the same employment qualifications as the other representatives on the Council and shall be subject to the same removal procedures as the other members on the Council. (from Article V Sec.7.2.)

Article VII

COUNCIL MEMBER VACANCY

When a vacancy arises in any group of the Council, the Council has the option of either selecting a "spokesperson" who will fill the role until the next annual election, or selecting the remaining eligible candidate with the second most votes in the last General Election for that group. (from Article V Sec.7.1.)

Section 1 – Eligible Candidate: If the council selects the remaining eligible candidate with the second most votes in the last General Election, the new Council member will have complete voting privileges and will serve for the unexpired term of the former member. (from Article V Sec.7.1.)

Section 2 - Appointment: Instead of selecting the remaining eligible candidate with the second most votes in the last General Election, The Council shall have the authority to appoint, by two-thirds (2/3) vote of the existing Council members, a spokesperson from the affected Group to speak on behalf of the employees affected by the vacancy. Any Council member may nominate an employee for discussion and vote. Under this option, this person will not vote on Council business unless there is at least six months remaining on the original term vacated, if so the Council may grant voting rights. At the next annual election, a replacement shall be selected following normal election procedures regardless of whether or not that group was scheduled for election that year. The new Council member will have complete voting privileges but, if necessary will face re-election the following year in order to return the group to its scheduled election cycle. (from Article V Sec.7.1.)
**Article VIII – Section 8 –**

**EAC DELEGATES (from Article 5 Sec.8)**

The Council members shall, with approval of the affected Appointing Authorities, determine the number of delegate areas necessary to adequately represent employees in an EAC group.

Delegates shall be selected in a manner prescribed by the Council and the appointments made with the approval of the Council.

The delegate roster shall be updated in January of each year or as needed due to organizational or staffing changes. Council members are responsible for assuring that each of the delegate areas in their group is staffed. New delegates are introduced at the March delegate meeting.

**Article VI-IX**

**OFFICERS (from Article VI)**

Section 1: OFFICERS' DUTIES: Officers of the Council shall perform the following duties:

Section 2: The CHAIRPERSON shall:

- Preside at all meetings of the Council.
- Make all Committee appointments.
- Be a member Ex-Officio of all committees.
- Represent the Council on any external committees, working groups, or other similar activities within County government wherein Council participation has been designated or invited.
- Perform all other duties pertaining to the Office of the Chairperson.
- Present his/her respective report of operation of the Council for the current operational year, at the December meeting of the Council.
- Provide updates on Council activities and concerns to the Unified Personnel Board at their scheduled meetings.

Section 3: The VICE CHAIRPERSON shall:

- Act as Chairperson in his/her absence.
- Perform all other duties pertaining to the Office of Vice Chairperson as prescribed by the Chairperson and/or the Council.
Section 4: The SECRETARY shall:

- Record the minutes of all meetings.
- Take attendance records at all meetings.
- Maintain Committee reports.
- Perform such other duties as may be delegated by the Council of the Chairperson.
- Publish approved minutes for distribution.

Article VII  X

COMMITTEES (from Article VII)

Section 1: The Chairperson shall appoint members of the Council to serve on committees.

Section 2: All committees shall provide agendas and verbal reports at all subsequent meetings until completion or release.

Section 3: The Chairperson is an Ex-Officio member of all committees.

Article VIII  XI

OPERATIONAL YEAR (from Article VIII)

The operational year of the Council shall be January 1 of one calendar year through December 31 of the same calendar year.

Article XII

DIRECTOR OF HUMAN RESOURCES - ANNUAL EVALUATION

The Council’s annual evaluation of the Director of Human Resources shall be completed by the regular scheduled meeting in December for review of the current operational year. The review and comments will be presented at the scheduled December Council meeting for discussion and approval. Upon approval by the Council, the evaluation will be forwarded to the Personnel Board and to the Human Resources liaison to the Council.

Article X  XIII

AMENDMENTS (from Article X)

The Council may later amend, revise, add to, or repeal these Bylaws and/or adopt new Bylaws at pleasure by a two thirds (2/3) vote of the members of the Council after two (2) weeks notice to the members and the Director of Human Resources, and approval of the Personnel Board. Upon approval by a two thirds vote of the members of the Council the said changes shall be presented to the Personnel Board for approval at their next regular scheduled board meeting.
Article I - NAME

This body shall be known as the Employees' Advisory Council to the Personnel Board of the Pinellas County Unified Personnel System, hereinafter called the Council or EAC.

Article II - STATEMENT OF PURPOSES AND OBJECTIVES

Section 1 - The express purpose of the Employees' Advisory Council, acting as a representative body of all classified employees, shall be to serve in an advisory capacity to the Personnel Board, management, and their fellow employees.

Section 2 - To improve understanding between management and employees, the Council shall render assistance both to management and their fellow employees.

- Members of the Council are urged to assist in resolving problems between employees and management where such assistance would not interfere or interrupt the general procedures set forth in the rules dealing with such matters.
- Where there is evidence of unjust or unnecessary treatment involving a group of employees, the Council shall investigate and attempt to resolve the matter with those parties involved.
- When conditions warrant, and with the approval by the Council, the Appointing Authorities may be invited to any Council meeting for discussion of mutual problems or information sharing. In addition to any such meeting, informal discussion between the Appointing Authorities and the Advisory Council are encouraged.

Section 3 - The Council is charged with developing and recommending ideas related to working conditions, morale, public image, efficiency, employee safety, employee insurance programs, and other employee related benefits.

Section 4 - The duties of the Council members shall be to transact all business brought before the Council for said Council's disposition.
Section 5 - Furthermore, no member of the Council shall use it as a means for personal or political gain, nor shall the Council as a whole take part in any movement not in keeping with the real purpose and objective of the Council.

Article III - MEETINGS

Section 1 - MEETINGS: Normally there shall be regular monthly meetings of this Council on the third (3rd) Wednesday of each month. Said meetings to be held at 2:30 p.m. at a designated location.

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- Adjournment

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Section 6 - VOTING: Every member of the Council shall have the right and be entitled to one vote, in person, upon every proposal properly submitted to vote at any meeting. Council members may vote on an individual proposal by Proxy by sending an email to the Chair with the Proxy’s name prior to voting.

Section 7 - RULES OF ORDER: "Robert's Rules of Order" shall be utilized as a guideline for all matters of procedure not specifically covered by these Bylaws.

Section 8 - HUMAN RESOURCES DEPARTMENT'S ROLE: The Director of Human Resources or his/her designee shall act in an advisory and liaison capacity to the Council.
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- (1) PROPERTY APPRAISER
- (1) SUPERVISOR OF ELECTIONS
- (1) OTHER APPOINTING AUTHORITIES (Representing: County Attorney, Office of Human Rights, Human Resources, Forward Pinellas, Business Technology Services)
- (8) BOARD OF COUNTY COMMISSIONERS - 1 from each of 8 Groups

Council Member selected by Appointment:

- (1) REPRESENTATIVE AT LARGE – appointed by a quorum of the 14 EAC Elected Members

Section 3 - GROUP COMPOSITION: The Council shall establish the composition of each Representative Group according to geographical, organizational and numerical considerations, in a manner that will best serve the established purposes and objectives of the Council. Any changes to this Section requires approval of the Personnel Board.

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Section 5 - QUALIFICATIONS: The members shall have been employed for at least one year by Pinellas County as a permanent employee of the classified service.

Section 6 - POWERS TO ELECT OFFICERS: The Council, at their December meeting each year, shall elect a Chairperson, a Vice Chairperson, and a Secretary. These officers will take office at the first scheduled meeting in January.

Section 7 - REMOVAL OF OFFICERS AND/OR MEMBERS: Any officer and/or member may be removed by the Council whenever, in the judgment of the Council, the best interest of the Council will be served thereby, by a two thirds (2/3) vote of the Council, after two (2) weeks notice and reason for removal to the members of the Council and the Human Resources Director. Members missing three (3) consecutive monthly meetings or six (6) meetings over a twelve (12) month period shall have a review by the Council with the possible action of removal.

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Section 1 - Election Process: It shall be the responsibility of the Employees' Advisory Council to establish, with the approval of the Personnel Board, the electoral process for all parties elected to said Council and for classified service employees within the Unified Personnel System aspiring to be elected to the Council.

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Section 3 - Election Policy: The Elections Committee shall conduct each election annually in accordance with the policies and procedures approved by the Employees' Advisory Council each year. The policies and procedures shall be approved by the Employees' Advisory Council no later than the July meeting.

Section 4 - Election Review Request: A classified employee who believes that inappropriate activities, such as violation of campaign rules, voter fraud, voter coercion, etc., have significantly affected a primary or general election, may file a written complaint to the Elections committee, which shall investigate the matter and present a report to the chairperson. If, in its report, the Elections Committee finds merit in the complaint, the chairperson shall schedule a meeting, within ten working days, for the entire Council, during which it shall review the Elections Committee report and consider what action to take regarding the situation. After considering the evidence presented, and the greater good to all concerned, the Council, with the support of two-thirds vote of those voting, may require a new election in the EAC group(s) affected.
Article VI - AT LARGE REPRESENTATIVE

The At Large Representative shall be appointed by a quorum of the other 14 representatives on the Council following the election of officers. This representative shall serve for a two year term and is eligible for reappointment by a quorum vote of the Council at the end of each two year term. This representative shall meet the same employment qualifications as the other representatives on the Council and shall be subject to the same removal procedures as the other members on the Council.

Article VII - COUNCIL MEMBER VACANCY

When a vacancy arises in any group of the Council, the Council has the option of either selecting a "spokesperson" who will fill the role until the next annual election, or selecting the remaining eligible candidate with the second most votes in the last General Election for that group.

Section 1 - Eligible Candidate: If the council selects the remaining eligible candidate with the second most votes in the last General Election, the new Council member will have complete voting privileges and will serve for the unexpired term of the former member.

Section 2 - Appointment: The Council shall have the authority to appoint, by two-thirds (2/3) vote of the existing Council members, a spokesperson from the affected Group to speak on behalf of the employees affected by the vacancy. Any Council member may nominate an employee for discussion and vote. Under this option, this person will not vote on Council business unless there is at least six months remaining on the original term vacated, if so the Council may grant voting rights. At the next annual election, a replacement shall be selected following normal election procedures regardless of whether or not that group was scheduled for election that year. The new Council member will have complete voting privileges but, if necessary will face re-election the following year in order to return the group to its scheduled election cycle.

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The Council members shall, with approval of the affected Appointing Authorities, determine the number of Delegate areas necessary to adequately represent employees in an EAC group.

Delegates shall be selected in a manner prescribed by the Council and the appointments made with the approval of the Council.

The delegate roster shall be updated in January of each year or as needed due to staffing or organizational changes. Council members are responsible for assuring that each of the delegate areas in their group is staffed. New delegates are introduced at the March delegate meeting.
Article IX - OFFICERS

Section 1: OFFICERS’ DUTIES: Officers of the Council shall perform the following duties:

Section 2: The CHAIRPERSON shall:

- Preside at all meetings of the Council.
- Make all Committee appointments.
- Be a member Ex-Officio of all committees.
- Represent the Council on any external committees, working groups, or other similar activities within County government wherein Council participation has been designated or invited.
- Perform all other duties pertaining to the Office of the Chairperson.
- Present his/her respective report of operation of the Council for the current operational year, at the December meeting of the Council.
- Provide updates on Council activities and concerns to the Unified Personnel Board at their scheduled meetings.

Section 3: The VICE CHAIRPERSON shall:

- Act as Chairperson in his/her absence.
- Perform all other duties pertaining to the Office of Vice Chairperson as prescribed by the Chairperson and/or the Council.

Section 4: The SECRETARY shall:

- Record the minutes of all meetings.
- Take attendance records at all meetings.
- Maintain Committee reports.
- Perform such other duties as may be delegated by the Council of the Chairperson.
- Publish approved minutes for distribution.

Article X - COMMITTEES

Section 1 - The Chairperson shall appoint members of the Council to serve on committees.

Section 2 - All committees shall provide agendas and furnish verbal reports at all subsequent meetings until completion or release.

Section 3 - The Chairperson is an Ex-Officio member of all committees.
Article XI - OPERATIONAL YEAR

The operational year of the Council shall be January 1 of one calendar year through December 31 of the same calendar year.

Article XII - DIRECTOR OF HUMAN RESOURCES - ANNUAL EVALUATION

The Council's annual evaluation of the Director of Human Resources shall be completed by the regular scheduled Council Meeting in December for review of the current operational year. The review and comments will be presented at the scheduled December Council meeting for discussion and approval. Upon approval by the Council, the evaluation will be forwarded to the Personnel Board and to the Human Resources liaison to the Council.

Article XIII - AMENDMENTS

The Council may later amend, revise, add to, or repeal these Bylaws and/or adopt new Bylaws at pleasure by a two thirds (2/3) vote of the members of the Council, after two (2) weeks notice to the members and the Director of Human Resources. Upon approval by a two thirds vote of the members of the Council the said changes shall be presented to the Personnel Board for approval at their next regular scheduled board meeting.
To: The Honorable Chair and Members of the Unified Personnel Board

From: Holly J. Schoenherr, Director of Human Resources

Date: August 30, 2019

Subject: Revision of Human Resources Classification Specifications

Recommendation:

It is recommended that the members of the Unified Personnel Board approve the following actions, effective September 29, 2019, related to the adoption of recommendations provided by Evergreen Solutions, LLC.

Implementation of the proposed classification plan for Exempt Service will require the revision of many classification specifications, adhering to all applicable laws and guidelines for employment practices. I appreciate the Board’s consideration and approval of the recommended changes to the following class specifications (attached) for exempt positions in the Human Resources Department:

<table>
<thead>
<tr>
<th>Current Title and Pay Grade</th>
<th>New Title and Pay Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resources Business Partner</td>
<td>P1</td>
</tr>
<tr>
<td>Human Resources Coordinator</td>
<td>P1</td>
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<tr>
<td>Human Resources Coordinator</td>
<td>P1</td>
</tr>
<tr>
<td>Human Resources Officer</td>
<td>SM5b</td>
</tr>
<tr>
<td>Human Resources Manager</td>
<td>SM3b</td>
</tr>
<tr>
<td>Director, Human Resources</td>
<td>E4</td>
</tr>
</tbody>
</table>

This action by the Board is necessary since the Human Resources Director’s delegated authority does not apply to actions within the Human Resources Department.

Attachments
Human Resources Consultant

Category: Exempt  
Pay Grade: E22  
Job Code: 20157

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

JOB SUMMARY
Performs responsible professional work coordinating projects with staff to implement human resource (HR) processes and programs of the Pinellas County Unified Personnel System (UPS); performs as a lead worker responsible for planning and coordinating other professional and technical staff to implement complex human resources programs in one or more major HR activities and program areas; relieves senior managers of professional level assignments, special projects, and important policy or management level assignments to ensure delivery of timely services and strong departmental communications; trains and coordinates with other staff in the development, implementation, and administration of major personnel programs, conferring with appointing authorities and department managers on personnel administration, as well as assisting with the research or development of policies and procedures consistent with the UPS; makes decisions, prepares reports, and makes recommendations on important policies and programs.

ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)
- Implements and administers personnel processes governing policies, rules, regulations, and practices;
- Implements and manages important and sensitive personnel programs, operations, and activities;
- Participates in special studies, surveys, and the collection of information on difficult operational and administrative problems and prepares reports recommending solutions or courses of action;
- Researches, analyzes, and resolves complex problems and policy issues related to HR including handling difficult and sensitive cases and assignments that may include employment problems or controversy;
- Coordinates HR activities impacting UPS HR policies, processes, and activities;
- Represents management at meetings, conferences, and other important operations interacting with officials and managers to implement personnel programs and deliver high quality services;
- Advises managers, officials, employees, and others on complex administrative employment issues, rules, and regulations;
- Reviews and approves/disapproves disciplinary actions and terminations and facilitates disciplinary interviews including pre-disciplinary hearings;
- Interprets HR policies, rules, and regulations for administrators, managers, or individual employees;
- Researches, prepares, and coordinates establishment of new or revisions in policies and procedures to deliver, maintain, and improve HR customer service;
- Consults and counsels employees, managers, and supervisors on highly specialized HR matters as well as the full range of HR services and programs;
- Prepares, coordinates, and delivers services to support workshops, training, education, and special workforce projects or employment related matters;
- Performs other related job duties as assigned.
QUALIFICATIONS

Education and Experience:
Bachelor’s degree in personnel or human resources management, public or business administration, finance, or directly related field and four (4) years of highly technical and professional human resources management operations experience with two (2) years of direct experience in the area of assignment with lead worker, supervisor, or supervisory training; or an equivalent combination of education, training, and/or experience.

Special Qualifications (May be required depending on area of assignment):
- Florida Driver's License or Florida Commercial Driver’s License and endorsement, if any.
- Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
- Candidate to demonstrate competence, possess specialized training, or certifications in one or more specific HR programs and functions.
- Other knowledge, skills, abilities, and credentials required for a specific position.

Knowledge, Skills and Abilities:
- Knowledge of multiple human resource disciplines, including compensation practices, organizational diagnosis, employee relations, diversity, performance management, and federal and state employment laws;
- Knowledge of public administration principles and practices;
- Knowledge of human resources programs, principles, and practices;
- Knowledge of employment and labor laws, regulations, and requirements;
- Knowledge of office automation, data processing principles, and practices;
- Knowledge of statistical concepts and methods;
- Knowledge of laws, rules, and regulations applicable to County government;
- Ability to apply computer applications and software;
- Ability to analyze facts and to exercise sound judgment and to arrive at valid and appropriate conclusions;
- Ability to prepare and deliver instruction and learning plus lead individuals and groups to meet desired objectives;
- Ability to prepare written reports;
- Ability to analyze and solve administrative problems and to render advice and assistance to managers, supervisors, employees, applicants, and other individuals;

PHYSICAL/MENTAL DEMANDS
The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:
- Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than with the whole hand as in handling.
- Grasping: Applying pressure to an object with the fingers and palm.
- Handling: Picking, holding, or otherwise working, primarily with the whole hand.
- Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
- Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
- Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
- Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
- Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- Repetitive motion: Substantial movements (motions) of the wrist, hands, and/or fingers.

WORKING CONDITIONS
Work is performed in a safe and secure work environment that may periodically have unpredicted requirements or demands.
Human Resources Consultant, Sr.

Category: Exempt
Pay Grade: E23
Job Code: 20158

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

JOB SUMMARY
Performs highly responsible professional work coordinating projects and supervising staff to implement human resource (HR) processes and programs of the Pinellas County Unified Personnel System (UPS); performs as a supervisor responsible for planning and coordinating other professional and technical staff to implement more complex human resources programs in one or more major HR activities and program areas; supervises, trains, and coordinates with other staff in the development, implementation, and administration of major personnel programs, conferring with appointing authorities and department managers on personnel administration, as well as assisting with the research or development of policies and procedures consistent with the UPS; reviews candidates and determines who to hire; analyses information, draws conclusions, and makes sound recommendations on important policies and programs and prepares reports and recommendations on ways to implement them.

ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)
- Implements and administers personnel processes governing policies, rules, regulations, and practices;
- Supervises professional, technical, and/or clerical staff engaged in the day-to-day operations of an area(s) of HR;
- Interviews, selects, hires, orients and develops personal growth opportunities for employees and trains employees in coordination with department management;
- Implements and manages important and sensitive personnel programs, operations, and activities;
- Participates in special studies, surveys, and the collection of information on difficult operational and administrative problems and prepares reports recommending solutions or courses of action;
- Researches, analyzes, and resolves complex problems and policy issues related to HR including handling difficult and sensitive cases and assignments that may include employment problems or controversy;
- Assesses processes, policies and systems, recommends improvements to programs, services and processes, and implements those recommendations;
- Prepares, coordinates, and delivers services to support workshops, training, education, and special workforce projects or employment related matters;
- Represents management at meetings, conferences, and other important operations interacting with officials and managers to implement personnel programs and deliver high quality services;
- Advises managers, officials, employees, and others on complicated administrative employment issues, rules, and regulations;
- Works closely with staff to resolve the more complex problems and may fill in for subordinate staff as needed;
- Reviews and approves/disapproves disciplinary actions and terminations and facilitates disciplinary interviews including pre-disciplinary hearings;
- Interprets HR policies, rules, and regulations for administrators, managers, or individual employees;
• Researches, prepares, and coordinates establishment of new or revisions in policies and procedures to deliver, maintain, and improve HR customer service;
• Consults and counsels employees, managers, and supervisors on highly specialized HR matters as well as the full range of HR services and programs;
• Prepares, coordinates, and delivers services to support workshops, training, education, and special workforce projects or employment related matters;
• Performs other related job duties as assigned.

QUALIFICATIONS

Education and Experience:
Bachelor’s degree in human resources management, public or business administration, finance, or directly related field and four (4) years of highly technical and professional human resources management operations experience with two (2) years of direct experience in the area of assignment with lead worker, supervisor, or supervisory training; or an equivalent combination of education, training, and/or experience.

Special Qualifications (May be required depending on area of assignment):
• Florida Driver's License or Florida Commercial Driver’s License and endorsement, if any.
• Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
• Candidate to demonstrate competence, possess specialized training, or certifications in one or more specific HR programs and functions.
• Other knowledge, skills, abilities, and credentials required for a specific position.

Knowledge, Skills and Abilities:
• Knowledge of multiple human resource disciplines, including compensation practices, organizational diagnosis, employee relations, diversity, performance management, and federal and state employment laws;
• Knowledge of public administration principles and practices;
• Knowledge of human resources programs, principles, and practices;
• Knowledge of employment and labor laws, regulations, and requirements;
• Knowledge of office automation, data processing principles, and practices;
• Knowledge of statistical concepts and methods;
• Knowledge of laws, rules, and regulations applicable to County government;
• Ability to apply computer applications and software;
• Ability to analyze facts and to exercise sound judgment and to arrive at valid and appropriate conclusions;
• Ability to prepare and deliver instruction and learning plus lead individuals and groups to meet desired objectives;
• Ability to prepare written reports;
• Ability to analyze and solve administrative problems and to render advice and assistance to managers, supervisors, employees, applicants, and other individuals;
• Ability to supervise the work of subordinate staff.

PHYSICAL/MENTAL DEMANDS

The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:
• Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than with the whole hand as in handling.
• Grasping: Applying pressure to an object with the fingers and palm.
• Handling: Picking, holding, or otherwise working, primarily with the whole hand.
• Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
• Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
• Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
• Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
• Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
• Repetitive motion: Substantial movements (motions) of the wrist, hands, and/or fingers.

WORKING CONDITIONS

Work is performed in a dynamic environment that requires sensitivity to change and responsiveness to changing goals, priorities, and needs.
This proposed version incorporates language revisions along with formatting updates applied to all classification specifications.

**Human Resources Officer**

**Category:** Exempt

**Pay Grade:** SM5bE26

**Job Code:** 20274

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

**JOB SUMMARY**

This is a responsible, professional and supervisory human resources work in assessing, planning, supervising, and directing work in one of the following functional areas of human resources (HR): benefits, classification and compensation, recruitment and selection, or training and development. An employee in this classification serves as a technical expert in the area of responsibility and is responsible for planning, directing, supervising and coordinating other professional and technical staff to implement complex human resource programs involving complex specialized areas and assignments; in training, compensation and classification, recruitment and selection, records administration, benefits, and other human resource functions. The incumbent makes decisions and prepares reports, and recommends new or modifications in existing system wide policies and programs. The incumbent supervises programs; supervises human resource functions vital to the County’s human resource programs and operations and is expected to work collaboratively with other Human Resource Officers, Human Resource Business Partners, Consultants, and other HR staff to design and develop integrated programs which meet professional standards and best meet the evolving needs of the appointing authorities and the UPS. The position reports to a HR Manager or Department Director; work is performed under general direction with considerable latitude for individual initiative and judgment and is reviewed by observation of results achieved and periodic reports and conferences.

**ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)**

- Supervises professional, technical, and/or clerical staff engaged in the day-to-day operations of an area(s) of human resources;
- Implements and administers personnel processes governing policies, rules, regulations, and practices;
- Supports HR Director and Division Directors in planning and directing assigned human resources programs and all department activities and completes special projects assignments;
- Advises directors, officials, employees, and others on complicated administrative and technical employment issues, rules, laws, and regulations;
- Recommends policies and procedures within area(s) of expertise/assignment including modifications and improvements which meet professional standards and contribute to the improved effectiveness of the Unified Personnel System;
- Administers and interprets County personnel policies for administrators, managers or individual employees;
- Coordinates and administers computer-based programs, policies, and procedures as necessary to implement human resource operations/programs plus ensures computer related processes run smoothly;
- Partners with organizational leaders to identify needs within HR area of assignment and implements new programs and training as needed;
HUMAN RESOURCES OFFICER

- Advises senior leadership regarding initiatives and activities that promote maximum staff effectiveness and creates a positive impact on organizational performance;
- Plans, launches, monitors, and acts on long-range improvement initiatives that are aligned with the organization’s strategic goals;
- Designs and establishes benchmarks that measure the impact and effectiveness of human resources programs within area of assignment;
- Forges working relationships with internal and external stakeholders, including but not limited to universities/colleges, public schools, private industry, government entities, etc.;
- Coordinates and manages needs assessments of internal stakeholders such as frontline leaders, individual contributors, support staff, and others;
- Identifies opportunities to share best practices and improve technical and organizational effectiveness across units;
- Manages the budget and meets budgetary goals and objectives;
- Assists in the development of the health fund budget as well as monitors the fund;
- Performs other related work/job duties as assigned or required.

QUALIFICATIONS

Education and Experience:
Bachelor’s degree in human resources, organizational development, education, public administration, or directly related field and four (4) years of professional human resources experience in the relevant area of human resources with two (2) years of leadership or supervisory experience; or a Master’s degree and two (2) years of leadership or supervisory experience in the relevant area of human resources; or an equivalent combination of education, training, and/or experience.

Special Qualifications (May be required depending on area of assignment):
- Florida Driver’s License or Florida Commercial Driver’s License and endorsement, if any.
- Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
- Candidate to demonstrate competence, possess specialized training, or certifications in one or more specific HR programs and functions.
- Other knowledge, skills, abilities, and credentials required for a specific position.

Knowledge, Skills and Abilities:
- Knowledge and technical expertise in the area of assignment including best practices for today and the future;
- Knowledge of public administration techniques, principles, and practices;
- Knowledge of federal, state, and local laws and guidelines pertaining to employment with specific attention to the area of assignment;
- Knowledge of merit system principles and polities processes;
- Knowledge of computer systems and operations to implement and administer human resource operations and services.
- Ability to apply technical expertise creatively to best achieve organizational goals and meet professional standards;
- Ability to develop and implement progressive policies and practices within area of assignment to achieve productivity, cost containment, and other human resource objectives;
- Ability to supervise and lead a diverse staff responsible for implementation of technical area(s) of human resources services;
- Ability to establish and maintain effective working relationships with administrative officials, associates, and the general public;
- Ability to develop administrative practices, procedures, and systems for a human resources program;
- Ability to analyze facts and to exercise sound judgment and to arrive at valid conclusions;
- Ability to prepare and deliver instruction and learning plus lead individuals and groups to meet desired objectives;
- Ability to effectively communicate both orally and in writing to groups and individuals;
• Ability to present ideas persuasively to internal and external audiences;
• Ability to encourage, motivate, and guide individuals and teams in learning and improving effectiveness;
• Ability to contribute to operational, tactical, and strategic planning in support of the organization’s business plan;
• Ability to develop visual aids and other instructional materials to meet informational and training needs;
• Ability to develop and maintain effective working relationships with vendors, manufacturers, elected officials, management, employees, and the general public.

PHYSICAL/MENTAL DEMANDS
The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:
• Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than with the whole hand as in handling.
• Grasping: Applying pressure to an object with the fingers and palm.
• Handling: Picking, holding, or otherwise working, primarily with the whole hand.
• Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
• Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
• Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
• Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
• Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
• Repetitive motion: Substantial movements (motions) of the wrist, hands, and/or fingers.

WORKING CONDITIONS
Work is performed in a dynamic environment that requires sensitivity to change and responsiveness to changing goals, priorities, and needs.
Human Resources Officer

Category: Exempt
Pay Grade: E26
Job Code: 20274

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

JOB SUMMARY
Performs highly responsible, professional and supervisory human resources work in assessing, planning, supervising, and directing work in one of the functional areas of human resources (HR). An employee in this classification serves as a technical expert in the area of responsibility and is responsible for planning, directing, supervising and coordinating other professional and technical staff to implement complex human resource programs involving complex specialized areas and assignments; makes decisions and prepares reports, and recommends new or modifications in existing system wide policies and programs; supervises human resource functions vital to the County’s human resource programs and operations and is expected to work collaboratively with other Human Resource Officers, Human Resource Consultants, and other HR staff to design and develop integrated programs which meet professional standards and best meet the evolving needs of the appointing authorities and the UPS.

ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)

- Supervises professional, technical, and/or clerical staff engaged in the day-to-day operations of an area(s) of human resources;
- Implements and administers personnel processes governing policies, rules, regulations, and practices;
- Supports HR Director and Division Directors in planning and directing assigned human resources programs and all department activities and completes special projects assignments;
- Advises directors, officials, employees, and others on complicated administrative and technical employment issues, rules, laws, and regulations;
- Recommends policies and procedures within area(s) of expertise/assignment including modifications and improvements which meet professional standards and contribute to the improved effectiveness of the Unified Personnel System;
- Administers and interprets County personnel policies for administrators, managers or individual employees;
- Coordinates and administers computer-based programs, policies, and procedures as necessary to implement human resource operations/programs plus ensures computer related processes run smoothly;
- Partners with organizational leaders to identify needs within HR area of assignment and implements new programs and training as needed;
- Advises senior leadership regarding initiatives and activities that promote maximum staff effectiveness and creates a positive impact on organizational performance;
- Plans, launches, monitors, and acts on long-range improvement initiatives that are aligned with the organization’s strategic goals;
- Designs and establishes benchmarks that measure the impact and effectiveness of human resources programs within area of assignment;
• Forges working relationships with internal and external stakeholders, including but not limited to universities/colleges, public schools, private industry, government entities, etc.;
• Coordinates and manages needs assessments of internal stakeholders such as frontline leaders, individual contributors, support staff, and others;
• Identifies opportunities to share best practices and improve technical and organizational effectiveness across units;
• Manages the budget and meets budgetary goals and objectives;
• Assists in the development of the health fund budget as well as monitors the fund;
• Performs other related job duties as assigned.

QUALIFICATIONS

Education and Experience:
Bachelor’s degree in human resources, organizational development, education, public administration, or directly related field and four (4) years of professional human resources experience in the relevant area of human resources with two (2) years of leadership or supervisory experience; or a Master’s degree and two (2) years of leadership or supervisory experience in the relevant area of human resources; or an equivalent combination of education, training, and/or experience.

Special Qualifications (May be required depending on area of assignment):
• Florida Driver's License or Florida Commercial Driver’s License and endorsement, if any.
• Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
• Candidate to demonstrate competence, possess specialized training, or certifications in one or more specific HR programs and functions.
• Other knowledge, skills, abilities, and credentials required for a specific position.

Knowledge, Skills and Abilities:
• Knowledge and technical expertise in the area of assignment including best practices for today and the future;
• Knowledge of public administration techniques, principles, and practices;
• Knowledge of federal, state, and local laws and guidelines pertaining to employment with specific attention to the area of assignment;
• Knowledge of merit system principles and processes;
• Knowledge of computer systems and operations to implement and administer human resource operations and services.
• Ability to apply technical expertise creatively to best achieve organizational goals and meet professional standards;
• Ability to develop and implement progressive policies and practices within area of assignment to achieve productivity, cost containment, and other human resource objectives;
• Ability to supervise and lead a diverse staff responsible for implementation of technical area(s) of human resources services;
• Ability to establish and maintain effective working relationships with administrative officials, associates, and the general public;
• Ability to develop administrative practices, procedures, and systems for a human resources program;
• Ability to analyze facts and to exercise sound judgment and to arrive at valid conclusions;
• Ability to prepare and deliver instruction and learning plus lead individuals and groups to meet desired objectives;
• Ability to effectively communicate both orally and in writing to groups and individuals;
• Ability to present ideas persuasively to internal and external audiences;
• Ability to encourage, motivate, and guide individuals and teams in learning and improving effectiveness;
• Ability to contribute to operational, tactical, and strategic planning in support of the organization’s business plan;
• Ability to develop visual aids and other instructional materials to meet informational and training needs;
• Ability to develop and maintain effective working relationships with vendors, manufacturers, elected officials, management, employees, and the general public.
 PHYSICAL/MENTAL DEMANDS
The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:
- Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than with the whole hand as in handling.
- Grasping: Applying pressure to an object with the fingers and palm.
- Handling: Picking, holding, or otherwise working, primarily with the whole hand.
- Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
- Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
- Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
- Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
- Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- Repetitive motion: Substantial movements (motions) of the wrist, hands, and/or fingers.

 WORKING CONDITIONS
Work is performed in a dynamic environment that requires sensitivity to change and responsiveness to changing goals, priorities, and needs.
Human Resources Assistant Director

Category: Exempt
Pay Grade: E31
Job Code: 20284

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

JOB SUMMARY
Performs highly responsible managerial and supervisory work leading and directing subordinate supervisors and staff to implement human resource (HR) policies, processes, and programs of the Pinellas County Unified Personnel System (UPS); assists the director with developing and implementing policies and programs to include planning and directing comprehensive personnel programs; performs as an expert manager responsible for planning, directing, supervising, and coordinating other professional and technical staff to implement complex human resource programs involving specialized areas and assignments.

ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)
- Establishes and reviews key strategic priorities and translates them into actionable and quantitative plans.
- Plans, directs, coordinates, and exercises general supervision through divisional supervisors over personnel engaged in diversified personnel management activities;
- Acts as HR director if the director is not present;
- Assists the director with formulating annual goals and methods of evaluating accomplishment of those goals and other departmental activities with assistance of departmental staff;
- Manages and supervises the budget and staff resources of several department functions in order to provide personnel services and implement a comprehensive mix of personnel/human resource programs and personnel services;
- Represents the organization at meetings, conferences, and other important operations meetings interacting with officials and managers to administer personnel programs and deliver high quality services;
- Assists managers in the preparation of policies, procedures, and prepares budget and controlling departmental procedures/operations to conform with requirements and resource plans;
- Advises managers, officials, employees, and others on complicated administrative employment issues, rules, and regulations and oversees major legal investigations;
- Administers and interprets County personnel policies for administrators, managers, or individual employees;
- Performs other related job duties as assigned.

QUALIFICATIONS
Education and Experience:
Bachelor’s degree with major coursework in business, public administration, human resources, or related field and four (4) years of responsible professional work in human resource management that include two (2) years of supervising professionals implementing two or more major human resource areas of responsibility; or a Master’s degree and two (2) years of experience as described above; or an equivalent combination of education, training, and/or experience.
Special Qualifications (May be required depending on area of assignment):
• Florida Driver's License or Florida Commercial Driver’s License and endorsement, if any.
• Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
• Candidate to demonstrate competence, possess specialized training, or certifications in one or more specific HR programs and functions.
• Other knowledge, skills, abilities, and credentials required for a specific position.

Knowledge, Skills and Abilities:
• Knowledge of employment organizations and personnel administration processes, laws, rules, and regulations;
• Knowledge of federal, state, and local laws and guidelines pertaining to employment;
• Knowledge of the principles, practices, and procedures of public and business administration, as applied in a large organization;
• Knowledge of budget and accounting principles, practices, and procedures, as applied in a large organization.
• Knowledge of County budgeting procedures and ability to apply this knowledge to administer and coordinate administrative and operational budgets;
• Knowledge of the principles of management and supervision;
• Knowledge of computer systems and operations to implement and administer human resource operations and services;
• Knowledge of statistical concepts and methods;
• Knowledge of public administration techniques and principles and practices;
• Knowledge of laws, rules, and regulations applicable to County government.
• Ability to apply computer applications and software;
• Ability to develop and implement progressive policies and practices to achieve affirmative action, productivity, cost containment, and other human resource objectives;
• Ability to lead a diverse staff responsible to implement a comprehensive mix of personnel services;
• Ability to establish and maintain effective working relationships with administrative officials, associates, and the general public;
• Ability to develop administrative practices, procedures, and systems for personnel programs;
• Ability to analyze facts and to exercise sound judgment and to arrive at valid conclusions;
• Ability to prepare and deliver instruction and learning plus lead individuals and groups to meet desired objectives;
• Ability to effectively communicate both orally and in writing to groups and individuals.

PHYSICAL/MENTAL DEMANDS
The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:
• Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
• Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
• Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
• Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
• Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
• Repetitive motion: Substantial movements (motions) of the wrist, hands, and/or fingers.

WORKING CONDITIONS
Work is performed in a dynamic environment that requires sensitivity to change and responsiveness to changing goals, priorities, and needs.
This proposed version incorporates language revisions along with formatting updates applied to all classification specifications.

**Director, Human Resources**

Category: Exempt
Pay Grade: E4–E40
Job Code: 20290

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

**JOB SUMMARY**

**This is** performs highly responsible administrative, professional, technical, supervisory, and managerial work directing the Unified Personnel System for Pinellas County. Work involves development and implementation of organization-wide policies and programs to include planning and directing comprehensive personnel programs; including recruitment, selection, placement, classification, compensation, benefits administration, staff development and training, tuition reimbursement, employee communications, publications/awards, volunteer services, records systems administration, and related personnel activities. An employee in this class is required to exercise versatility in developing and establishing effective personnel programs. General direction is provided by the Unified Personnel Board in terms of major objectives to be accomplished. Work is performed with considerable independent judgment, discretion, and initiative in carrying out the mission of the department with efficiency and effectiveness.

**ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)**

- Plans, directs, coordinates, and exercises general supervision through divisional supervisors over personnel engaged in diversified personnel management activities including recruitment, selection, classification, compensation, benefits administration, staff development and training, personnel records, and transactions;
- Formulates new personnel policies and revisions of existing policies for review by Appointing Authorities and the Employees’ Advisory Council and action by the Personnel Board;
- Consults with management regarding employee relations problems such as possible adverse actions to be taken against employees or morale problems in the workplace;
- Formulates with assistance of departmental staff annual goals and methods of evaluating accomplishment of those goals and other departmental activities;
- Presents County policy and personnel matters to department heads, elected officials, or individual employees;
- Represents the department at various national, state and/or local personnel conferences, seminars and meetings;
- Directs the development and revision of the classified and exempt pay plan and benefit program;
- Serves as Executive Secretary of the Unified Personnel Board;
- Performs other related work/job duties as assigned or required.

**QUALIFICATIONS**

**Education and Experience:**
Bachelor’s degree with major coursework in business, public administration, human resources, or related field and four (4) years of responsible professional work in human resource management that include two (2) years of supervising professionals implementing two or more major human resource areas of responsibility; or a
Master’s degree and two (2) years of experience as described above; or an equivalent combination of education, training, and/or experience.

Special Qualifications (May be required depending on area of assignment):
• Florida Driver's License or Florida Commercial Driver’s License and endorsement, if any.
• Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
• Other knowledge, skills, abilities, and credentials required for a specific position.

Knowledge, Skills and Abilities:
• Knowledge of the principles, practices, and procedures of public personnel administration;
• Knowledge of the terminology, job content, and qualification requirements of a variety of public occupations;
• Knowledge of recent developments, current literature, and sources of information in the field of public personnel administration;
• Knowledge of statistical concepts and methods;
• Knowledge of the principles and techniques of modern office management and procedures.
• Ability to plan, direct, and coordinate the work of technical subordinates engaged in activities of personnel administration;
• Ability to supervise the maintenance of a variety of records and to prepare and submit required regular and special reports;
• Ability to apply computer applications and software;
• Ability to analyze facts and to exercise sound judgment and to arrive at valid conclusions;
• Ability to express ideas clearly and concisely, orally and in writing.

PHYSICAL/MENTAL DEMANDS
The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:
• Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than with the whole hand as in handling.
• Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
• Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
• Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
• Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
• Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.

WORKING CONDITIONS
Work is performed in a dynamic environment that requires sensitivity to change and responsiveness to changing goals, priorities, and needs.
Director, Human Resources

Category: Exempt
Pay Grade: E40
Job Code: 20290

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

JOB SUMMARY
Performs highly responsible administrative, professional, technical, supervisory, and managerial work directing the Unified Personnel System for the Pinellas County, under the supervision of the Unified Personnel Board; develops and implements organization-wide policies and programs; exercises versatility in developing and establishing effective personnel programs.

ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)
- Plans, directs, coordinates, and exercises general supervision through divisional supervisors over personnel engaged in diversified personnel management activities;
- Formulates new personnel policies and revisions of existing policies for review by Appointing Authorities and the Employees’ Advisory Council and action by the Personnel Board;
- Consults with management regarding employee relations problems such as possible adverse actions to be taken against employees or morale problems in the workplace;
- Formulates with assistance of departmental staff annual goals and methods of evaluating accomplishment of those goals and other departmental activities;
- Presents County policy and personnel matters to department heads, elected officials, or individual employees;
- Represents the department at various national, state and/or local personnel conferences, seminars and meetings;
- Directs the development and revision of the classified and exempt pay plan and benefit program;
- Serves as Executive Secretary of the Unified Personnel Board;
- Performs other related job duties as assigned.

QUALIFICATIONS
Education and Experience:
Bachelor’s degree with major coursework in business, public administration, human resources, or related field and four (4) years of responsible professional work in human resource management that include two (2) years of supervising professionals implementing two or more major human resource areas of responsibility; or a Master’s degree and two (2) years of experience as described above; or an equivalent combination of education, training, and/or experience.

Special Qualifications (May be required depending on area of assignment):
- Florida Driver's License or Florida Commercial Driver’s License and endorsement, if any.
- Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
- Other knowledge, skills, abilities, and credentials required for a specific position.
Knowledge, Skills and Abilities:

- Knowledge of the principles, practices, and procedures of public personnel administration;
- Knowledge of the terminology, job content, and qualification requirements of a variety of public occupations;
- Knowledge of recent developments, current literature, and sources of information in the field of public personnel administration;
- Knowledge of statistical concepts and methods;
- Knowledge of the principles and techniques of modern office management and procedures.
- Ability to plan, direct, and coordinate the work of technical subordinates engaged in activities of personnel administration;
- Ability to supervise the maintenance of a variety of records and to prepare and submit required regular and special reports;
- Ability to apply computer applications and software;
- Ability to analyze facts and to exercise sound judgment and to arrive at valid conclusions;
- Ability to express ideas clearly and concisely, orally and in writing.

PHYSICAL/MENTAL DEMANDS

The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:

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- Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
- Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
- Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
- Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.

WORKING CONDITIONS

Work is performed in a dynamic environment that requires sensitivity to change and responsiveness to changing goals, priorities, and needs.
To: The Honorable Chair and Members of the Unified Personnel Board

From: Holly J. Schoenherr, Director of Human Resources

Date: August 30, 2019

Subject: Delegation of Authority Related to Exempt Classifications

Recommendation:

It is recommended that the members of the Unified Personnel Board (UPB) delegate the following authority to the Human Resources Director related to implementation of Phase II of the Classification and Compensation Study completed in 2018:


2. Approve classification changes resulting from completion of secondary reviews of Exempt positions.

Any actions taken under this delegated authority will be presented to the UPB at the next available UPB meeting.

Background:

On June 7, 2018, the Unified Personnel Board approved a revision to Resolution 18-2, Delegated Authority of the Human Resources Director. Specifically, Section 2 was added and states that, “The discretion provided to the Director of Human Resources pursuant to this Resolution does not include authority to approve comprehensive structural or other substantive changes to the classification and compensation system.”

The Board is considering comprehensive structural changes to the classification plan for Exempt positions, with a recommended effective date of September 29, 2019. The implementation of the new Exempt classifications will involve not only changes to classification titles and pay grades, but also changes to the classification specifications (class specs) that describe the nature of work that is performed within each classification. Given the comprehensive nature of these changes, there will be over 170 classifications in need of revised class specs.
To facilitate the timely implementation of the Classification and Compensation Study completed by Evergreen Solutions, LLC, in 2018, I am requesting that the Board provide the Human Resources Director with delegated authority to review and approve revisions to class specs associated with implementing the new classification structure effective September 29, 2019. This delegation of authority, if approved, will include approval for the description of work within the class specs, classification titles, and pay grade allocations.

The implementation timeline for Phase II of the Classification and Compensation Study includes the following:

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept. 5, 2019</td>
<td>Personnel Board adopts new Exempt classifications effective Sept. 29, 2019</td>
</tr>
<tr>
<td>Week of Sept. 9, 2019</td>
<td>Exempt employees receive results of secondary reviews and notification of study-related pay adjustments</td>
</tr>
<tr>
<td>Sept. 12, 2019</td>
<td>Board of County Commissioners adopts Exempt pay plan, effective Sept. 29, 2019</td>
</tr>
<tr>
<td>By Sept. 20, 2019</td>
<td>Classification and pay changes are loaded into OPUS in advance of the Sept. 29 effective date</td>
</tr>
<tr>
<td>Sept. 29, 2019</td>
<td>Effective date for new Exempt classifications and associated pay adjustments</td>
</tr>
</tbody>
</table>

To avoid potential situations of delays in positions being assigned to the appropriate classification, or delays for any Exempt employee receiving an applicable pay adjustment related to classification actions, it is desirable for classification determinations to be finalized in time for the proposed implementation on Sept. 29, 2019.

On September 12, 2019, the Board of County Commissioners will be taking action to approve a revised Exempt pay plan to take effect simultaneously with the classification changes approved by the Personnel Board.

Thank you for your consideration of these requests.
To: The Honorable Chair and Members of the Unified Personnel Board

From: Holly J. Schoenherr, Director of Human Resources

Date: August 30, 2019

Subject: Adoption of Exempt Classifications

Recommendation:

It is recommended that the Unified Personnel Board approve changes to Exempt classifications (see attached Crosswalk), to be effective September 29, 2019, related to the adoption of recommendations provided by Evergreen Solutions, LLC, and supported by all six Appointing Authorities that fall under the BCC Exempt Pay Plan. The changes are consistent with Option 3 (Moderate Consolidation) from Evergreen’s recommendation options.

Background:

In May 2017, Pinellas County contracted with Evergreen Solutions to conduct a comprehensive study regarding our classification and compensation systems and processes. During the summer of 2017, 9 out of 10 Unified Personnel System (UPS) employees completed a Job Assessment Tool (JAT) which described in detail the duties and necessary knowledge, skills, and abilities related to the diverse array of jobs performed across the County. In addition, many employees met with Evergreen consultants in focus groups to share their thoughts about pay, benefits, and other factors impacting the work environment. On June 1, 2018, Evergreen delivered their Report of Findings and Recommendations, which provided information related to employee demographics, market data, and assessments of internal and external equity.

The study included three primary components:

1. Classification study – This involved conducting job analyses, evaluating current job classifications, and updating existing class specifications.
2. Compensation study – This involved a comprehensive market salary survey of targeted public and private sector organizations, an examination of pay equity issues, and an assessment of total compensation.
3. Pay administration review – This involved a review of current UPS compensation rules and guidelines, with recommendations for change to enhance competitiveness into the future.

1 Note: The four constitutional officers (Clerk of the Circuit Court and Comptroller, Property Appraiser, Supervisor of Elections, and Tax Collector) have the authority to maintain their own Exempt pay plans and all have chosen to maintain their current Exempt pay plans and classifications.
Adoption of Exempt Classifications
Page Two

In the report, Evergreen provided the following assessment of current conditions regarding UPS classifications and compensation:

- The classification system being utilized by the UPS is generally accurate, and titles describe the work being performed by employees; however, the UPS is currently carrying a larger number of unique titles than is needed.
- There is a positive relationship between employee length of service in the UPS and salary placement within the pay range.
- For most cases, there is appropriate distance between subordinate and supervisor pay.
- Most UPS employees are being paid wages that are more than 10% above what they would expect to receive, based on years in class.
- As JAT scores rise, pay grade midpoints rise, indicating that the UPS has done well with relating an employee’s rate of pay with their level of responsibility.
- When factoring for total compensation (i.e. including the value of benefits), the UPS was found to be, on average, offering slightly above market rate compensation compared to the whole of the public and private markets, as demonstrated in the table below.

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Public Sector (Primary Market Survey)</th>
<th>Private Sector (Economic Research Institute)</th>
<th>Blended Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries Only</td>
<td>2.3%</td>
<td>-0.8%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Total Compensation</td>
<td>7.8%</td>
<td>4.9%</td>
<td>6.1%</td>
</tr>
</tbody>
</table>

Evergreen recommended that the UPS adopt a method to reduce the number of unique classification titles to better reflect the various types of work performed by both Classified Service and Exempt Service positions within the UPS.

- Option 1: Banded Structure – Consists of 8 unique career bands with varying compensation levels; reduces the number of classifications from 650 to 49
- Option 2: Minor Consolidation – Involves minor consolidation of current classifications; reduces the number of classifications from 650 to 630
- Option 3: Moderate Consolidation – Involves moderate consolidation of current classifications; reduces the number of classifications from 650 to 560

All Appointing Authorities expressed support for the recommendation of Human Resources to adopt Option 3 above. Option 3 is a desirable structure, as it achieves the objective to reduce the number of unique classifications while maintaining the ability to provide opportunities for career paths and professional growth of employees.
Considering that implementation of changes for Exempt Service involves a more extensive process than it does for Classified Service, Appointing Authorities agreed that implementation should first focus on Classified positions (Phase 1), then on Exempt positions once the process for Classified implementation was completed (Phase 2). The Unified Personnel Board adopted a new classification plan and pay plan for Classified Service positions in September 2018. This action was followed by an opportunity for Classified employees to receive from Evergreen a secondary review of their classification and pay grade; the secondary review process was completed in March 2019. After completion of the Evergreen secondary review, eligible employees who had a downward reclassification were given an opportunity to request an additional review conducted by Human Resources and an appeal with the Unified Personnel Board. Phase 1 of the study for Classified employees was completed on June 6, 2019.

While the Unified Personnel Board manages the classification system for both service types, it has authority only for the Classified pay plans, not for Exempt pay plans. Those with the authority to implement Exempt pay plans include the Board of County Commissioners (BCC) and the four constitutional officers.

Appointing Authorities were provided an opportunity to identify any proposed reclassifications for which they have questions or concerns, and to request Evergreen to conduct a secondary review of those positions to determine whether adjustments to the original classification placement are warranted. The outcomes of this process for Appointing Authorities are reflected in the proposed classification structure that has been presented to the Personnel Board for adoption.

Exempt employees received a notification email August 2-6 and were provided ten days to submit a request for secondary review by Evergreen. The secondary review process was available for any Exempt employees that disagreed with the proposed classification or pay grade. Evergreen is currently processing all requests that were received, and it is expected that employees will receive the results of the reviews in early September 2019.

Attachments:
- Proposed Classification Crosswalk
- Implementation Timeline
- Sample Exempt Employee Notification
- Classification & Compensation Study FAQs
- Classification & Compensation Study Pay Adjustment Calculations
<table>
<thead>
<tr>
<th>Current Classification Title</th>
<th>Current Pay Grade</th>
<th>Recommended Classification Title</th>
<th>Recommended Pay Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>911 Division Director</td>
<td>SM3b</td>
<td>Director 1</td>
<td>E30</td>
</tr>
<tr>
<td>911 Public Safety Center Manager</td>
<td>SM7</td>
<td>911 Public Safety Center Manager</td>
<td>E24</td>
</tr>
<tr>
<td>911 Radio &amp; Technology Division Director</td>
<td>SM3b</td>
<td>Director 1</td>
<td>E30</td>
</tr>
<tr>
<td>Agenda Coordinator</td>
<td>P4</td>
<td>Executive Assistant 2</td>
<td>E15</td>
</tr>
<tr>
<td>Airport Operations Manager</td>
<td>SM5b</td>
<td>Airport Operations Manager</td>
<td>E26</td>
</tr>
<tr>
<td>Animal Services Field Manager</td>
<td>SM7</td>
<td>Animal Services Field Manager</td>
<td>E21</td>
</tr>
<tr>
<td>Animal Services Program Coordinator</td>
<td>P5</td>
<td>Animal Services Program Coordinator</td>
<td>E14</td>
</tr>
<tr>
<td>Animal Services Program Manager</td>
<td>P3</td>
<td>Animal Services Program Manager</td>
<td>E18</td>
</tr>
<tr>
<td>Assistant County Administrator</td>
<td>E3</td>
<td>Assistant County Administrator</td>
<td>E40</td>
</tr>
<tr>
<td>Assistant County Attorney 1</td>
<td>SM7</td>
<td>Assistant County Attorney 1</td>
<td>E21</td>
</tr>
<tr>
<td>Assistant County Attorney 2</td>
<td>SM3a</td>
<td>Assistant County Attorney 2</td>
<td>E31</td>
</tr>
<tr>
<td>Assistant Director, Convention &amp; Visitors Bureau</td>
<td>SM2a</td>
<td>Director 3</td>
<td>E35</td>
</tr>
<tr>
<td>Assistant to the County Administrator</td>
<td>SM4a</td>
<td>Assistant to the County Administrator</td>
<td>E28</td>
</tr>
<tr>
<td>BDRS Department Director</td>
<td>SM1</td>
<td>Director 3</td>
<td>E35</td>
</tr>
<tr>
<td>BTS Chief Technology Officer</td>
<td>SM2b</td>
<td>BTS Chief Technology Officer</td>
<td>E32</td>
</tr>
<tr>
<td>BTS Director</td>
<td>SM3a</td>
<td>Director 2</td>
<td>E32</td>
</tr>
<tr>
<td>Budget &amp; Financial Management Analyst</td>
<td>P1</td>
<td>Budget &amp; Financial Management Analyst</td>
<td>E22</td>
</tr>
<tr>
<td>Building Services Division Manager</td>
<td>SM4a</td>
<td>Building Services Division Manager</td>
<td>E28</td>
</tr>
<tr>
<td>Bureau Director, Airport</td>
<td>SM1</td>
<td>Airport Director</td>
<td>E41</td>
</tr>
<tr>
<td>Bureau Director, Animal Services</td>
<td>SM2a</td>
<td>Director 2</td>
<td>E32</td>
</tr>
<tr>
<td>Bureau Director, Communications</td>
<td>SM2a</td>
<td>Director 2</td>
<td>E32</td>
</tr>
<tr>
<td>Bureau Director, Convention &amp; Visitors Bureau</td>
<td>SMS</td>
<td>Director, Convention &amp; Visitors Bureau</td>
<td>E41</td>
</tr>
<tr>
<td>Bureau Director, Economic Development</td>
<td>SM2a</td>
<td>Director 3</td>
<td>E35</td>
</tr>
<tr>
<td>Bureau Director, Management/Budget</td>
<td>SM1</td>
<td>Director 3</td>
<td>E35</td>
</tr>
<tr>
<td>Bureau Director, Parks &amp; Conservation Resources</td>
<td>SM1</td>
<td>Director 3</td>
<td>E35</td>
</tr>
<tr>
<td>Bureau Director, Purchasing</td>
<td>SM2b</td>
<td>Director 3</td>
<td>E35</td>
</tr>
<tr>
<td>Bureau Director, Risk Management</td>
<td>SM2b</td>
<td>Director 2</td>
<td>E32</td>
</tr>
<tr>
<td>Bureau Director, Safety and Emergency Services</td>
<td>SM2a</td>
<td>Director 3</td>
<td>E35</td>
</tr>
<tr>
<td>Business Development Manager</td>
<td>P1</td>
<td>Airport Public Relations and Media Manager</td>
<td>E25</td>
</tr>
<tr>
<td>Business Development Manager</td>
<td>P1</td>
<td>Business Development Manager</td>
<td>E22</td>
</tr>
<tr>
<td>Business Development Manager</td>
<td>P1</td>
<td>Manager of Air Service Development &amp; Marketing</td>
<td>E25</td>
</tr>
<tr>
<td>Current Classification Title</td>
<td>Current Pay Grade</td>
<td>Recommended Classification Title</td>
<td>Recommended Pay Grade</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>-------------------</td>
<td>--------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Business Development Manager</td>
<td>P1</td>
<td>Manager of Airport Properties</td>
<td>E25</td>
</tr>
<tr>
<td>Chief Assistant County Attorney</td>
<td>E2</td>
<td>Chief Assistant County Attorney</td>
<td>E42</td>
</tr>
<tr>
<td>Chief Information Officer, BTS</td>
<td>E3</td>
<td>Chief Information Officer, BTS</td>
<td>E40</td>
</tr>
<tr>
<td>Chief Information Technologist</td>
<td>SM4b</td>
<td>Database Developer</td>
<td>E26</td>
</tr>
<tr>
<td>Chief Information Technologist</td>
<td>SM4b</td>
<td>Solutions Architect</td>
<td>E27</td>
</tr>
<tr>
<td>Chief Information Technologist</td>
<td>SM4b</td>
<td>Network/Telecom Analyst</td>
<td>E22</td>
</tr>
<tr>
<td>Claims Manager</td>
<td>SM5b</td>
<td>Risk Management Manager</td>
<td>E26</td>
</tr>
<tr>
<td>Coastal Management Coordinator</td>
<td>P1</td>
<td>Coastal Management Coordinator</td>
<td>E24</td>
</tr>
<tr>
<td>Code Enforcement Division Manager</td>
<td>SM4a</td>
<td>Code Enforcement Division Manager</td>
<td>E29</td>
</tr>
<tr>
<td>Communications Manager</td>
<td>SM6</td>
<td>Communications Manager</td>
<td>E23</td>
</tr>
<tr>
<td>Construction Administrator</td>
<td>SM5b</td>
<td>Construction Administrator</td>
<td>E25</td>
</tr>
<tr>
<td>Contract Services Supervisor</td>
<td>P1</td>
<td>Department Administrative Manager</td>
<td>E24</td>
</tr>
<tr>
<td>County Administrator</td>
<td>E1</td>
<td>County Administrator</td>
<td>Salary by contract</td>
</tr>
<tr>
<td>County Attorney</td>
<td>E1</td>
<td>County Attorney</td>
<td>Salary by contract</td>
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<td>Recommended Classification Title</td>
<td>Recommended Pay Grade</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------</td>
<td>----------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>SM6</td>
<td>Program Coordinator</td>
<td>E24</td>
</tr>
<tr>
<td>Program Coordinator</td>
<td>SM6</td>
<td>Section Manager 1</td>
<td>E26</td>
</tr>
<tr>
<td>Program Manager, BTS</td>
<td>SM5a</td>
<td>Enterprise Architect</td>
<td>E28</td>
</tr>
<tr>
<td>Program Manager, BTS</td>
<td>SM5a</td>
<td>Program Coordinator, BTS-OTI</td>
<td>E24</td>
</tr>
<tr>
<td>Program Manager, BTS</td>
<td>SM5a</td>
<td>Program Manager, BTS-OTI</td>
<td>E26</td>
</tr>
<tr>
<td>Project Coordinator-Administrative</td>
<td>P1</td>
<td>Project Coordinator-Administrative</td>
<td>E22</td>
</tr>
<tr>
<td>Project Coordinator-Project Management</td>
<td>P1</td>
<td>Engineer 2</td>
<td>E26</td>
</tr>
<tr>
<td>Project Coordinator-Project Management</td>
<td>P1</td>
<td>Project Manager, BTS-OTI</td>
<td>E26</td>
</tr>
<tr>
<td>Project Coordinator-Project Management</td>
<td>P1</td>
<td>Project Coordinator-Project Management</td>
<td>E23</td>
</tr>
<tr>
<td>Project Coordinator-Project Management</td>
<td>P1</td>
<td>Project Coordinator-Project Management, CV</td>
<td>E26</td>
</tr>
<tr>
<td>Project Coordinator-Project Management</td>
<td>P1</td>
<td>Technology Program Coordinator</td>
<td>E26</td>
</tr>
<tr>
<td>Project Coordinator-Technical</td>
<td>P1</td>
<td>Solutions Architect</td>
<td>E27</td>
</tr>
<tr>
<td>Public Works Director</td>
<td>SM1</td>
<td>Director 4</td>
<td>E37</td>
</tr>
<tr>
<td>Regulatory Compliance Manager</td>
<td>SM5a</td>
<td>Regulatory Compliance Manager</td>
<td>E25</td>
</tr>
<tr>
<td>Risk Management Safety Supervisor</td>
<td>SM8</td>
<td>Risk Management Safety Manager</td>
<td>E26</td>
</tr>
<tr>
<td>Section Manager 1</td>
<td>SM5a</td>
<td>Section Manager 1</td>
<td>E26</td>
</tr>
<tr>
<td>Section Manager 1</td>
<td>SM5a</td>
<td>Section Manager 2</td>
<td>E29</td>
</tr>
<tr>
<td>Section Manager 1, HS</td>
<td>SM5a</td>
<td>Section Manager 1, HS</td>
<td>E26</td>
</tr>
<tr>
<td>Section Manager 2</td>
<td>SM4a</td>
<td>Section Manager 2</td>
<td>E29</td>
</tr>
<tr>
<td>Section Manager 2</td>
<td>SM4a</td>
<td>Section Manager 3</td>
<td>E31</td>
</tr>
<tr>
<td>Section Manager 2, HS</td>
<td>SM4b</td>
<td>Section Manager 2, HS</td>
<td>E27</td>
</tr>
<tr>
<td>Section Manager 3</td>
<td>SM3a</td>
<td>Section Manager 3</td>
<td>E31</td>
</tr>
<tr>
<td>Section Manager 3, HS</td>
<td>SM4a</td>
<td>Section Manager 3, HS</td>
<td>E28</td>
</tr>
<tr>
<td>Senior Assistant County Attorney</td>
<td>SM2b</td>
<td>Senior Assistant County Attorney</td>
<td>E35</td>
</tr>
<tr>
<td>Senior CVB Sales Representative</td>
<td>P2</td>
<td>Senior CVB Sales Representative</td>
<td>E20</td>
</tr>
<tr>
<td>Senior Department Administrative Manager</td>
<td>SM5b</td>
<td>Section Manager 1</td>
<td>E26</td>
</tr>
<tr>
<td>Senior Department Administrative Manager</td>
<td>SM5b</td>
<td>Senior Department Administrative Manager</td>
<td>E25</td>
</tr>
<tr>
<td>Senior Engineer</td>
<td>SM5a</td>
<td>Engineer 3</td>
<td>E28</td>
</tr>
<tr>
<td>Senior Executive Assistant</td>
<td>P2</td>
<td>Executive Assistant 3</td>
<td>E19</td>
</tr>
<tr>
<td>Senior Facility Manager</td>
<td>SM5b</td>
<td>Facility Manager 3</td>
<td>E25</td>
</tr>
<tr>
<td>Current Classification Title</td>
<td>Current Pay Grade</td>
<td>Recommended Classification Title</td>
<td>Recommended Pay Grade</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td>-------------------</td>
<td>---------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Senior Public Works Operations Field Manager</td>
<td>SM5a</td>
<td>Section Manager 2</td>
<td>E29</td>
</tr>
<tr>
<td>Senior Veterinarian</td>
<td>SM4a</td>
<td>Veterinarian 2</td>
<td>E29</td>
</tr>
<tr>
<td>SES Financial Division Director</td>
<td>SM3a</td>
<td>Director 1</td>
<td>E30</td>
</tr>
<tr>
<td>Social Media Specialist</td>
<td>P3</td>
<td>Social Media Specialist</td>
<td>E18</td>
</tr>
<tr>
<td>Special Assistant to County Administrator</td>
<td>SM3a</td>
<td>Special Assistant to County Administrator</td>
<td>E31</td>
</tr>
<tr>
<td>Strategic Performance Management Analyst</td>
<td>P1</td>
<td>Strategic Performance Management Analyst</td>
<td>E22</td>
</tr>
<tr>
<td>Tax Collector Organization Management Analyst</td>
<td>P2</td>
<td>Tax Collector Organization Management Analyst</td>
<td>TBD</td>
</tr>
<tr>
<td>Technical Services Section Manager</td>
<td>SM4b</td>
<td>Technical Services Section Manager</td>
<td>E27</td>
</tr>
<tr>
<td>Utilities Technical Services Manager</td>
<td>SM5b</td>
<td>Utilities Technical Services Manager</td>
<td>E26</td>
</tr>
<tr>
<td>Veterans Services Director</td>
<td>SM7</td>
<td>Veterans Services Director</td>
<td>E21</td>
</tr>
<tr>
<td>Veterinarian</td>
<td>SM6</td>
<td>Veterinarian 1</td>
<td>E24</td>
</tr>
<tr>
<td>Wastewater Treatment Manager</td>
<td>SM5b</td>
<td>Wastewater Treatment Manager</td>
<td>E26</td>
</tr>
<tr>
<td>Water Quality Monitoring Manager</td>
<td>SM5a</td>
<td>Water Quality Monitoring Manager</td>
<td>E26</td>
</tr>
<tr>
<td>Water Research Project Manager</td>
<td>P1</td>
<td>Water Research Project Manager</td>
<td>E22</td>
</tr>
<tr>
<td>Water Supply Manager</td>
<td>SM5b</td>
<td>Water Supply Manager</td>
<td>E26</td>
</tr>
<tr>
<td>Zoning Manager</td>
<td>SM5a</td>
<td>Zoning Manager</td>
<td>E26</td>
</tr>
</tbody>
</table>
## Proposed Phase II Timeline

<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>Appointing Authorities meeting - Appointing Authorities discuss Phase II objectives, timeline, roles and responsibilities</td>
</tr>
<tr>
<td>May 17</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>July 9 - 12</td>
<td>Evergreen group meetings with exempt employees to review the Secondary Review process and address questions</td>
</tr>
<tr>
<td>July 26</td>
<td>Evergreen completes Secondary Review as requested by Appointing Authorities</td>
</tr>
<tr>
<td>August 2 - 6</td>
<td>Individual notices sent to Exempt employees regarding tentative classification/pay grade changes and pay adjustments (as applicable)</td>
</tr>
<tr>
<td>August 3 – 16</td>
<td>Exempt employees may request a Secondary Review by Evergreen consultants</td>
</tr>
<tr>
<td>August 13 – Sept. 2</td>
<td>Evergreen completes Secondary Reviews as requested by Exempt employees</td>
</tr>
<tr>
<td>Sept. 3</td>
<td>Evergreen provides final response regarding exempt recommendations</td>
</tr>
<tr>
<td><strong>Sept. 5</strong></td>
<td>Personnel Board adopts new Exempt classifications and sunsets obsolete classifications, effective September 29, 2019</td>
</tr>
<tr>
<td>Sept. 6 - 9</td>
<td>Final Evergreen recommendations shared with Appointing Authorities</td>
</tr>
<tr>
<td>Week of Sept. 9</td>
<td>Exempt employees receive results of Secondary Reviews (as applicable)</td>
</tr>
<tr>
<td>Sept. 9 -20</td>
<td>Exempt classification and pay data loaded in OPUS in advance of the September 29, 2019 effective date</td>
</tr>
<tr>
<td><strong>Sept. 12</strong></td>
<td>BCC formally adopts Exempt pay plan that incorporates UPB changes to Exempt classifications, effective September 29, 2019</td>
</tr>
<tr>
<td>Sept. 29</td>
<td>GO LIVE for new Exempt classifications and pay plans</td>
</tr>
<tr>
<td>Sept. 29</td>
<td>Effective date for Exempt classification-related pay adjustments</td>
</tr>
<tr>
<td>Oct. 13</td>
<td>Tentative effective date for FY20 General Increase</td>
</tr>
<tr>
<td>TBD</td>
<td>Individual notices sent to affected Exempt and Classified employees regarding Phase II equity adjustments</td>
</tr>
<tr>
<td>TBD</td>
<td>Equity adjustments for Exempt and Classified employees loaded in OPUS</td>
</tr>
<tr>
<td>TBD</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.
August 6, 2019

TO: John Doe

FROM: Holly J. Schoenherr, Director of Human Resources

SUBJECT: Results of Your Position Review

Evergreen Solutions has completed the review related to your position, and your Appointing Authority has been informed. As a result of this analysis, Evergreen has recommended a reclassification/reallocation of your position as follows:

<table>
<thead>
<tr>
<th>Classification</th>
<th>Pay Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Information Technology Analyst, Senior</td>
<td>P1</td>
</tr>
<tr>
<td>New Application Analyst</td>
<td>E22</td>
</tr>
</tbody>
</table>

Pay Grade

- Keep in mind that the new pay grade names and structure are completely different from the current ones. View the minimum, midpoint, and maximum pay rates for your new pay grade at: [www.pinellascounty.org/hr/proposed-plan](http://www.pinellascounty.org/hr/proposed-plan)

Class Specifications and Classification Crosswalk

- Proposed class specifications are available at: [www.pinellascounty.org/hr/exempt-proposed](http://www.pinellascounty.org/hr/exempt-proposed)
- The proposed classification crosswalk is available at: [www.pinellascounty.org/hr/study/pdf/exempt-crosswalk.pdf](http://www.pinellascounty.org/hr/study/pdf/exempt-crosswalk.pdf)

Secondary Review

- If there have been significant changes concerning your job or if you don’t agree with these results, you may request a secondary review of your position from Evergreen Solutions. To request a secondary review, complete the form found at [https://www.surveymonkey.com/r/PC_Exempt_Reviews](https://www.surveymonkey.com/r/PC_Exempt_Reviews) by 11:59 PM on Friday, August 16, 2019.
Pay Rate Adjustments

- Pay rate adjustments related to the results of the Classification and Compensation study will be calculated after the secondary reviews have been resolved. You will receive a follow up notification during the week of September 9th with details about the final results. See our FAQs for details about pay increase calculations.

Please note, the proposed changes are pending the approval of the Unified Personnel Board on September 5th, 2019. The proposed reclassification/reallocation of your position and any associated pay rate adjustment are expected to become effective with the pay period starting September 29th, 2019.

More Information

- Visit the webpage at www.pinellascounty.org/hr/study to find information or contact;
- Jack Loring, at 464-4838 or at jkloring@pinellascounty.org, or,
- Tywanna McGee at 464-4823 or at tmcgee@pinellascounty.org
Exempt Secondary Review Process

1. When did Exempt employees receive the preliminary Evergreen Solutions results?
   Preliminary results were emailed to Exempt employees at BTS, County Attorney, Forward Pinellas, Human Rights and Human Resources at their work email addresses on August 2, 2019. Exempt employees under the County Administrator/BCC received their results on August 6, 2019.

2. When will the Exempt changes go into effect?
   Changes to Exempt classifications, pay plan and individual pay adjustments are targeted for late September 2019.

3. Did supervisors receive a copy of the preliminary results for their employees?
   All Appointing Authorities participating in Phase II of the study have a copy of the master list preliminary results and should share this information with supervisors. Individual supervisors were not copied on the email notifications to employees.

4. What is the timeframe for submitting a secondary review request?
   The timeframe is 10 calendar days. The deadline for those employees who received results on Friday, August 2 is Monday, August 12 at 11:59 p.m. The deadline for those employees who received results on Wednesday, August 6 is Friday, August 16 at 11:59 p.m.

5. Where can I find the proposed pay plan?
   See the Proposed Exempt Pay Plan.

6. What documentation am I be expected to provide in my secondary review request?
   Some examples would be changes in duties since the time of the JAT, changes in department structure that has affected supervisory relationships or responsibilities, changes in working conditions, changes in classification titles since the JAT (e.g. promotions, demotions or transfers), etc. Requests without any documented justification will not be considered.

7. Can attachments be added to the secondary review form?
   The online secondary review form does not have the capability to attach documents. Additional information can be sent to Evergreen Solutions at JAT@consultevergreen.com.

8. When will I find out if I have a new pay rate?
   Pay rate adjustments will be calculated after the secondary reviews have been resolved. You will receive a follow-up notification in early September with details on the final results including any pay rate adjustments.

What if I don’t agree with the preliminary results?

If you would like Evergreen Solutions to review your proposed classification and/or pay grade, you may request a secondary review. This is an opportunity to provide additional information that was not considered as part of the initial review in 2017. You must supply new or revised information about your position for your request to be considered.

- If desired, complete an online Secondary Review Request form. The link is provided in your notification email.
- The deadline for submission is 10 calendar days as specified in your email notification.
- The form does not have the capability to save and continue later so your response and submission should be completed in a single sitting. For ease of completion, you may compose your responses in a Word document and copy them into the form.
- To learn more, view a brief video with instructions on completing the form.
- It is expected that secondary reviews will be resolved in approximately 30 days. You will be notified of the results via your work email.
9. **How will the pay increases be calculated?**
   Pay adjustments will be targeted to positions:
   • Found to be compensated behind market rates,
   • Needing adjustments to bring compensation to the minimum of the new pay grade, and
   • Impacted by compression resulting from bringing the pay of others to the minimum of the pay range.

   For more information, see [Classification & Compensation Study Pay Adjustment Calculations](#).

10. **Will additional market data be considered during the secondary review?**
    No. The initial phase of the project collected market data from governmental (“peer”) organizations which included: Broward County, Charlotte County, Collier County, Hillsborough County, Lee County, Manatee County, Orange County, Palm Beach County, Pasco County, Sarasota County, Volusia County, the City of Clearwater, the City of Dunedin, the City of Jacksonville, the City of Largo, the City of Orlando, the City of Pinellas Park, the City of St. Petersburg, and the City of Tampa.

11. **How can employees submit questions regarding the process?**
    Email questions on the secondary review process including how to submit the form to Evergreen Solutions at [JAT@consultevergreen.com](mailto:JAT@consultevergreen.com).

12. **How can I see my Job Assessment Tool (JAT)?**
    If you can’t find your copy of the completed JAT, you may request it by emailing Evergreen Solutions at [JAT@consultevergreen.com](mailto:JAT@consultevergreen.com).

13. **Will the duties that I wrote on my Job Assessment Tool (JAT) appear on my updated class specification?**
    Maybe. A class specification is a broad description with general duties so it will not include all of your specific duties which would be in your position description.

14. **What is the difference between a class specification and a position description?**
    A class specification is a broad description that encompasses the general duties of various jobs within the classification. A position description, which is created and maintained by the department, contains more detailed information about the duties of the individual position.

15. **What if I am in a different position now than I was 2 years ago when I did my Job Assessment Tool (JAT) or what if I’m new and I never did a JAT?**
    This is not an issue since the JAT is specific to a position, not a person. Evergreen analyzed data provided by hundreds of employees to determine the proper classification and job title for each position. Even if you were not able to complete a JAT for your current position, others did so which enabled Evergreen to review and classify your position.

**Study Overview**

16. **What did Evergreen Solutions do during the Classification & Compensation Study?**
    Our consultant, Evergreen Solutions, analyzed internal and external data to determine opportunities for improvement in the current classification and compensation systems. Tasks included an analysis of classification information collected via the Job Assessment Tool (JAT), an analysis of market data collected by a salary survey of benchmarked classifications, and the development of recommendations for a classification and compensation system that is internally equitable and externally competitive.

17. **Can I read the final report with the study’s findings?**
    Yes. The 53-page report is available at [www.pinellascounty.org/hr/study/pdf/report.pdf](http://www.pinellascounty.org/hr/study/pdf/report.pdf) and a 4-page Executive Summary is available at [www.pinellascounty.org/hr/study/pdf/executive-summary.pdf](http://www.pinellascounty.org/hr/study/pdf/executive-summary.pdf).

18. **How did Evergreen compare the County’s jobs with other organizations?**
    Benchmark positions (jobs) were selected that were representative of County positions. Benchmark jobs are those with a clear and consistent definition in the relevant labor market, for which reliable market data may be collected. These benchmark positions were matched with positions at peer organizations in Florida to compare the salary range and average actual salaries offered by peer organizations. Employees’ JAT submissions were used to inform the matches so that the actual job duties performed were compared with peer organizations, instead of simply comparing job titles. Matches were then scrutinized by Human Resources and Evergreen staff to make sure that only appropriate matches were used. Once all the matches had been finalized, the average salary (both range and average actual salary) from peer organizations was compared to the salary offered by the County to determine if the County was “behind”
or “ahead” of the market.

19. **What did the market study show? How do Pinellas County’s pay rates compare to other employers?**

   Evergreen’s comprehensive market study of peer organizations throughout Florida showed that, on average, Unified Personnel System (UPS) pay rates are comparable to our public sector peers; and UPS compensation is comparable to the private sector when factoring in the value of UPS benefits (see the [Evergreen Solutions presentation](#)).

20. **Did the study address internal equity (fairness) between jobs in the Unified Personnel System?**

   Yes. Evergreen used data from the Job Assessment Tool (JAT) to systematically construct a structure that reflects the relative worth of each job in relation to all jobs *within* the UPS.

   The internal and external equity determinations will benefit the organization by providing:
   
   a. Competitive pay structures and pay rates to aid in hiring and retaining a quality workforce
   b. Measures of job worth in order to increase employee job satisfaction
   c. A framework for guiding decisions about promotional increases

21. **How can I get more information?**

    Visit the Classification and Compensation Study website at [www.pinellascounty.org/hr/study](http://www.pinellascounty.org/hr/study), or contact the Pay and Classification team at [pay.class@pinellascounty.org](mailto:pay.class@pinellascounty.org).
Classification & Compensation Study
Pay Adjustment Calculations

The following information is about the methodology used to calculate pay rate adjustments as a result of the implementation of position reclassifications or reallocations as recommended by Evergreen Solutions. The purpose of the pay adjustments is to ensure that employees are paid in a fair and competitive manner, as measured against the employment market.

Are the pay adjustments based on individual qualifications?
No. The pay adjustments are not based on individual performance but on duties and responsibilities to ensure the position is paid competitively as compared to similar positions at comparable organizations.

How were pay adjustments made?
Pay adjustments were made as a two-step process in this order:
   Step 1: Address those positions which fall below market levels.
   Step 2: Bring pay rates to new pay grade minimums and address resulting compression.

Compression refers to situations when there is minimal or no difference in pay between employees regardless of skills or experience.

<table>
<thead>
<tr>
<th>PAY ADJUSTMENT EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SAMPLE PAY GRADE</strong></td>
</tr>
<tr>
<td>Minimum</td>
</tr>
<tr>
<td>$25,000</td>
</tr>
</tbody>
</table>

**STEP 1 EXAMPLE:**
Address those positions which fall below market levels.

- Identify classifications where the maximum of the new pay grade is at least 4.5% above the maximum of the current pay grade. (The 4.5% movement is consistent with the 4.5% midpoint progression in the new pay grade structure.)
- Apply pay adjustments equal to 4% of the midpoint of the new classification, up to the new midpoint.

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary</th>
<th>Situation</th>
<th>Pay Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>$23,180</td>
<td>Salary is below the pay grade minimum of $25,000</td>
<td>Increase of $1,320 (equals 4% of the midpoint) to $24,500</td>
</tr>
<tr>
<td>Jane</td>
<td>$30,000</td>
<td>Salary is below the new midpoint of $33,000</td>
<td>Increase of $1,320 (equals 4% of the midpoint) to $31,320</td>
</tr>
<tr>
<td>Sue</td>
<td>$32,000</td>
<td>Salary is below the new midpoint of $33,000</td>
<td>Increase of $1,000 to $33,000 (4% of the midpoint is $1,320 but the pay adjustment stops at the midpoint so the increase is limited to $1,000)</td>
</tr>
<tr>
<td>Bill</td>
<td>$34,000</td>
<td>Salary is above the new midpoint of $33,000</td>
<td>None (no increase for salaries at or above the midpoint)</td>
</tr>
</tbody>
</table>
STEP 2 EXAMPLE: Bring pay rates to the new pay grade minimums and address resulting compression.

- After applying pay adjustments from Step 1 above, if any individual in the new classification receives an increase to bring them up to the new minimum, use the dollar amount associated with the highest individual increase in that classification and apply that dollar amount as an increase, up to the new midpoint, for anyone in the classification who is below the new midpoint.

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary</th>
<th>Situation</th>
<th>Pay Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>$23,180</td>
<td>Salary is below the pay grade minimum of $25,000. Step 1 (above): He received an increase of $1,320 (4% of the midpoint) to $24,500. He is still below the pay grade minimum of $25,000 so he receives an increase of $500 to $25,000.</td>
<td>Step 1: Increase of $1,320 to $24,500 Step 2: Increase of $500 to $25,000</td>
</tr>
<tr>
<td>Jane</td>
<td>$30,000</td>
<td>Salary is below the new midpoint of $33,000. Step 1 (above): She received an increase of $1,320 to $31,320. Step 2: She receives an additional increase of $500 because another employee in the classification (John, see above) was below the pay grade minimum and was given an increase of $500. John was the furthest below the pay grade minimum so his increase was the highest individual increase in the classification. Accordingly, all the other employees in the classification who were below the new midpoint of $33,000 received a $500 increase up to the midpoint.</td>
<td>Step 1: Increase of $1,320 to $31,320 Step 2: Increase of $500 to $31,820</td>
</tr>
<tr>
<td>Sue</td>
<td>$32,000</td>
<td>Salary is below the new midpoint of $33,000. Increase of $1,000 to $33,000 ($1,320 equals 4% of the midpoint but the pay adjustment stops at the midpoint)</td>
<td>Step 1: Increase of $1,000 to $33,000 Step 2: No additional adjustment since her salary is now at the midpoint of $33,000</td>
</tr>
<tr>
<td>Bill</td>
<td>$34,000</td>
<td>Salary is above the new midpoint of $33,000</td>
<td>None (no increase for salaries at or above the midpoint)</td>
</tr>
</tbody>
</table>

For a visual representation of the two-step process, see the Pay Adjustment Process Flowchart.

Who was not eligible for the pay adjustments related to the Classification & Compensation Study?

- Individuals with a pay rate that is at or above the new midpoint did not receive an increase because the midpoint is considered the market value of a position.
- Employees in temporary positions were eligible only for increases to bring pay rates to the new pay grade minimum.
To: The Honorable Chair and Members of the Unified Personnel Board

From: Holly J. Schoenherr, Director of Human Resources

Date: August 30, 2019

Subject: Pay Plan Adjustments

Recommendation:
I recommend a two percent (2%) increase to the minimum and maximum pay rates of the following pay plans effective October 13, 2019:

- Classified Pay Plan
- Fire Fighting Personnel Pay Plan

Background:
The last adjustments to the pay rates occurred in 2018 when the minimum and maximum pay rates for the above pay plans were increased by two percent (2%).

One of the strategic goals of Pinellas County is to “Create a Quality Workforce in a Positive, Supportive Organization.” In addition, it is the mission of Human Resources to “Cultivate a diverse, talented, and engaged workforce prepared to effectively serve the citizens of Pinellas County.” To fulfill these objectives, it’s important to provide a competitive pay plan that is based upon market values commensurate with the skill sets needed for success. The proposed budget for FY20 includes a three percent (3%) general increase for County employees.

If general increases are approved for FY2020, those increases will be awarded the pay period beginning October 13, 2019. Implementing the pay plan adjustments in conjunction with the general increase will allow us to (a) provide employees currently paid at the maximum of their pay grade with a general increase that includes an increase to base pay, and (b) award general increases based on an adjusted (higher) midpoint.

Adjustment of Pay Grade Maximums: Adjusting pay grade maximums prior to a general increase will allow for some increase to base pay for employees who are currently at the maximum of their pay grades. Otherwise, the general increase for those employees would be all as a lump sum payment with no increase to base pay.

Adjustment of Pay Grade Midpoints: If a general increase is approved, increases will be calculated as three percent (3%) of the midpoint of the employee’s pay grade in accordance with...
Personnel Rules. Adjusting the pay grade midpoints prior to a general increase, therefore, will provide all employees with a slightly higher general increase than what they would have received if there were no adjustment to the pay grades.

Adjustment of Pay Grade Minimums: It is our intention to implement the timing of the pay grade adjustment with the general increase so that those employees at the minimum of the pay grade will receive a general increase, valued at three percent the (3%) of the midpoint, to bring their compensation slightly above the newly adjusted minimum. Note that employees will not receive a two percent (2%) pay increase to the new pay grade minimum, followed by the general increase; this would result in an increase of over five percent.

I appreciate your consideration of this request.

Attachment:
- Current & Proposed Classified Pay Plans
<table>
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<tr>
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Human Resources Director

Action Taken Under Authority Delegated by the Unified Personnel Board

The Human Resources Director, having been granted delegated authority to act on behalf of the Unified Personnel Board, has taken the following action from **July 21, 2019 through August 17, 2019**.

### ADDITIONS

<table>
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<tr>
<th>SPEC NO.</th>
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<th>EEO4 CODE</th>
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<td>Div Dir, Purch. &amp; Risk Mgmt</td>
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<td>BDRS Deputy Director</td>
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### EXTENSION OF TEMPORARY EMPLOYMENT

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<td>BCC/I61</td>
<td>Management Intern</td>
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2019 Human Resources Director Goals
September 5, 2019 Progress Report

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
    - Presentation on diversity and inclusion regarding persons with disabilities for HR staff on August 28
  - 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
  - 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
    - Continue HR Director’s “A Visit to Your Workplace” 1-on-1 meetings with EAC Representatives at their worksites (see attached)
    - 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
  - Continue to partner with Appointing Authorities to expand the internship program (see attached)

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
Enhance decision support services for Appointing Authorities through more robust dashboards, key performance indicators (KPI’s) and other workforce reports from Human Resources

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
    Presented Performance Management Framework: Investing in a Better Future to the Appointing Authorities on September 4 (see attached)
- Complete 2019 Employee Voice Survey – Goal of 75% participation rate
  Survey closed on August 26. Almost 83% (8 in 10 employees) participated—exceeding our 2019 goal of 75% and the previous participation rate in 2017 of 74% (see attached)

Total Rewards
- Implement Phase II of the Classification and Compensation Study
  - Work with Appointing Authorities and Personnel Board to establish new Exempt classifications
    Present at the September 5 Personnel Board meeting
  - Work with affected stakeholders to update the BCC Exempt pay plan
    Present at the September 12 Board of County Commissioners meeting
  - 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
  Statements to be mailed to employees in early October (see attached draft)

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

September 5, 2019 Attachments:
A. A Visit to Your Workplace as of 8/21/19
B. 2019 Pinellas County Internship Program Update
C. Performance Management Framework: Investing in a Better Future
D. 2019 Employee Voice Survey Preliminary Results & Communications
E. Total Compensation Statement Draft
Employees’ Advisory Council (EAC)
A Visit to Your Workplace – Spring 2019
(as of 8/21/2019)

<table>
<thead>
<tr>
<th>EAC Member</th>
<th>Representing</th>
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<th>Meeting Time</th>
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<td>Ashley Skubal</td>
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<td>Henry Gomez</td>
<td>BCC Group I - Solid Waste Mosquito Control North GMD</td>
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<td>August 20</td>
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<td>Randy Rose</td>
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<td>Charles Toney</td>
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<td>Donna Beim</td>
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<td>Doris McHugh</td>
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<td>Christian Steiermann</td>
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<tr>
<td>Richard Carvale</td>
<td>Tax Collector</td>
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2019 Pinellas County Internship Program Update

What is an internship?

An internship is a form of experimental learning that integrates knowledge and theory learned in the classroom with practical application and skill development in a professional setting. Students gain valuable applied experience, make professional connections, and explore career paths. Employers gain the opportunity to guide and evaluate talent.

Internship Program

Currently, Pinellas County Government offers an unpaid Internship Program to high school and college students who are seeking academic credit. Occasionally, departments will host paid interns.

Pinellas County Human Resources’ goal is to create a pipeline of talent to inspire careers in public service among high school and college students through the Internship Program.

Recent accomplishments

- 42 interns have contributed close to 4,000 hours of service since Oct. 1, 2018.
- Pinellas County has partnered with the School Board for the Summer Career Acceleration Program – 8 high school students interned at various departments (Communications, Public Works, 911 Regional, Emergency Medical Services, Human Resources, Office of Management & Budget, and Airport) and contributed 1,100 hours in 7 weeks. View a 4-minute video Pinellas County School Students Work in Pinellas County Government at https://lnkd.in/eFScw3D.
- Pinellas County continues to nurture relationships with local colleges and universities and formalize agreements with them including the University of South Florida and Consumer Protection; Pinellas Tech College and Fleet Management; St. Petersburg College and Animal Services; University of South Florida Resilience Practicum and Pinellas County, and many more.

Looking ahead

- Expanding the Bright Futures Program by increasing volunteer opportunities to high school students
- Continuing Job Shadowing Program to provide high school and college students the opportunity to shadow County department staff to encourage a career in public service
- Formalizing a plan for a 10-week Internship Program to provide additional frameworks for departments to host interns
- Increasing opportunities for paid internships (Clerk of the Circuit Court and the Office of Technology and Innovation)
- Hosting Internship Workshops for departments to provide a detailed overview of a successful internship

www.pinellascounty.org/intern
Performance Management Framework: Investing in a Better Future

Recommendation

Based on previous meetings with the Appointing Authorities, Human Resources recommends rolling out an enhanced performance management framework to all employees over the course of one year. Performance assessment is the foundation of any merit pay system. It is critical to have the foundation of a good performance management system that everyone understands before moving towards merit pay.

As detailed in the Learning Proposal on page 6, Human Resources will design an enhanced performance management program. The program will be communicated to all employees through blended learning opportunities including instructor-led workshops, videos, podcasts, self-assessment surveys, and role playing, plus a variety of resources such as guides and eLearning modules. The timing is as follows:

- Phase 1: Supervisory employees, 12 hours of instruction, 2.5 months
- Phase 2: Non-supervisory employees, 3 hours of instruction, 9.5 months
- Completion of both phases targeted for December 31, 2020

Situation Summary

Current State – Possible Challenges with Performance Management Systems

Employees have expressed their dissatisfaction with the current performance management process. This is consistent with a growing national trend. What was once a predictable, if tedious, practice has become a major controversy and a hot topic. There is currently abundant literature — from the *Harvard Business Journal* to Society for Human Resources Management articles — which discuss a widespread perception that the performance appraisal process tends to be inadequate and underdelivers what it promises. Some of the common themes expressed by Pinellas County employees through classroom feedback, coaching, disciplinary actions and organizational development efforts are:

**Ineffective Process**

- Managers don’t want to deliver tough messages around performance
- Managers and employees are only evaluated on goals and not real skills, therefore, how you achieve your goals is not important. People can display bad behaviors and are not accountable
- People have been in their jobs for a long time, and deem there really aren’t any goals to set

**Managers are Unskilled**

- Managers lack the skills to manage performance effectively
- There are limited career growth opportunities here; therefore, development planning isn’t that beneficial
- Managers would rather hold on to their people than help them advance in their careers
Performance Management Framework:
Investing in a Better Future

No Line-Level Sponsorship
- Front line supervisors don’t want to be bothered with performance management
- Performance management is seen as a Human Resources practice
- This is not a true “pay-for-performance” culture. Employees will have to both understand the value of performance feedback and that not every conversation about performance results in a base pay increase

Lack Effective Tools
- There is limited training for managers around how to conduct good performance management conversations
- Managers don’t have the time to focus on performance management
- Merit increases will be awarded evenly across teams to avoid employee dissatisfaction
- Performance is not tied to compensation or other talent decisions
- Don’t know how/not good at writing a review or using the tool (FACE)

Inconsistent Process
- There are numerous performance management forms across the County
- Different technologies are being used for performance management
- Performance cycles vary greatly from quarterly to annually to not at all
- Senior leaders cannot get a fully informed picture of their organization

The shared perspective is that performance management is not done well, results in a process that is time-consuming, burdensome, and fails to deliver value. This is further supported in the Culture Scan (see Appendix B).

Desired State
The goal is a culture of accountability with a clear connection between performance and rewards. A compensation strategy that includes a pay for performance culture is intended to differentiate pay across different levels of performance while retaining our top talent.

Our high-performing employees have told us that they want to feel like they are getting rewarded for their performance, and that under-performers are being held accountable; it’s part of their definition of fair pay.

What are we trying to change or improve?
- Improving performance across the organization (raising the bar)
- Improving manager effectiveness with performance management
- Greater recognition of top talent and ready now successors
- Getting rid of ineffective behaviors and rewarding desired behaviors

Given that we cannot (and should not) wait for perfect circumstances to begin to implement pay for performance, we should keep these features in mind as a goal, and work towards them.
Performance Management Framework: Investing in a Better Future

Components of a Performance Management Program Process

- Goal setting
- Development planning
- Check-ins along the way
- Coaching and feedback
- Competency Anchored Rating Scales (CARS)
- Quarterly check-in (recommended)
- Calibration team review
- Links to compensation

Elements of the Performance Review

- Competencies
- Goals assessment
- Accomplishments
- Overall productivity and performance
- Professional development

Competencies

The focus of the competency-based performance review is on the behaviors, and how the behaviors tie back to successful execution of the goals. This type of review aims to link the objectives and the competencies in a very clear, transparent way. Within the actual review, the focus should be on behaviors — and how the display of those behaviors connects to the achievement of goals. Having a defined set of core and job-specific competencies built into each role or job description will aid in this process (see Figure 1).

- Lominger Competency Model
- Application of five core competencies
- Behavioral descriptors
- Measurement of competencies (Less Skilled, Skilled and Talented)

Tools

- Forms for goalsetting, development planning, appraisals etc.
- Learning curriculum and format
- Job aids to learn the new process

People

- Leadership commitment and support
- Manager commitment, capability, confidence
- Employee commitment, capability, confidence
Performance Management Framework: Investing in a Better Future

Successful Change/Proven Practices
- Understand the business case for change
- Start with our senior leadership team: make the commitment and move from involved to fully engaged
- Engage all your organization’s management and prepare them for the journey
- Build a broad understanding of the change process
- Evaluate and tailor the change effort
- Develop adaptive leadership skills and capabilities
- Create performance management learning opportunities

Engaged Leadership
- Initiate project-relevant communications in direct report meetings on a regular basis
- Visibly hold staff accountable for the change and ask frequently for their direct participation
- Regularly seek status from resources directly engaged in the performance management process
- Understand the implications of the change across the organization’s groups and demographic groups
- Challenge the status quo
- Monitor, identify, and address organizational resistance
- Communicate, communicate, and communicate

Introduction

Performance Management
Performance management is defined as a continuous process where supervisors and employees work together to establish objectives, monitor progress toward these objectives and assess results. With this process, employees receive regular feedback and coaching which is a vital development process for all employees.

The purpose of performance management is to develop people and to improve performance. It allows individuals to know what is expected of them by the organization. In turn they know what they need to do to improve organization effectiveness.

Managing performance requires us to reconcile caring for and developing our people with ensuring departmental and organizational aims are achieved. Managing performance requires us to strike a balance between compassion and accountability.

Performance Management Possible Outcomes

Administrative
- Help make compensation decisions (e.g. pay increases and incentives)
- Identify individuals who may be ready to take on new opportunities (e.g. promotions, assignments)
Performance Management Framework:
Investing in a Better Future

- Provide documentation to support ethical decisions and defend legal challenges
- Hold poor performers accountable for improving

Developmental
- Clarifying job responsibilities and expectations
- Enhancing individual and group productivity
- Developing employee capabilities to their fullest extent through effective feedback and coaching (see Figure 2)
- Driving behavior to align with the organization’s core values, goals and strategy
- Provide career guidance and developmental opportunities
- Foster a culture of employee engagement, feedback, accountability, and performance excellence
- Empower employees to take greater ownership of their performance goals
- Create an environment in which managers and employees can regularly communicate about strategic direction, organizational objectives, delivery target, and individual goals and accomplishments

Appointing Authority Responsibilities
- Commitment and leadership support. Design reflects strategic and philosophical directions of the organization and its culture. Strong signal that performance management is important
- Making staff available by coordination of workflows and priorities
- Informing staff of this performance management initiative
- Inform each other of any unforeseen changes, new developments, or other issues which may influence or impact this project so that Human Resources and Appointing Authorities can both adjust accordingly

Manager/Supervisor Responsibilities
- Provide honest, clear and concise expectations of an employee’s responsibilities
- Provide ongoing guidance and feedback
- Work with employees to develop individual goals that support the department’s mission
- Consistently and fairly enforce policy and procedure
- Maintain an inclusive, safe, and productive work environment

Employee Responsibilities
- Consistently perform assigned responsibilities and contribute to the department’s goals and business objectives
- Take an active role in developing and achieving performance goals
Performance Management Framework: Investing in a Better Future

- Consistently demonstrate good conduct including attendance, ethical use of work time and resources (stewardship)

Learning Proposal

Performance Management That Creates Positive Outcomes
This workshop will focus on performance management as a continuous process that drives development. It will look at techniques that recognize and implement solutions to support long-term results and will help to develop the tools to create a culture of trust and high impact performance.

Behaviors that contribute to a climate of organizational trust:
- Reliability: following through on commitments
- Honesty: telling the truth and admitting mistakes
- Courage: confronting difficult issues even in the face of resistance
- Competence: demonstrating the knowledge and skills necessary to carry out important tasks
- Intention: making decisions in the best interest of the organization; putting the welfare of others before individuals’ interests
- Compassion: being sensitive to others’ needs and giving them the benefit of the doubt

Learning Objectives
The course will focus on helping to:
- Understand the performance management cycle
- Provide tools used in the performance management process
- Build performance-driven relationships
- Coach and counsel staff to sustain/improve performance
- Provide more impactful feedback to inspire action, in a manner that minimizes defensiveness and maintains self-esteem
- Conduct difficult performance conversations
- Measure performance more accurately
- Lookout for common pitfalls, minimizing performance assessment errors and inflation

The performance management cycle (see Figure 3) is a continuous cycle that involves:
- **Planning** work in advance so that expectations and goals can be set
- **Monitoring** progress and performance continually
- **Developing** the employee’s ability to perform through learning and work assignments

![Figure 3 - Performance Management Cycle](image-url)
Performance Management Framework: 
Investing in a Better Future

- Assessing periodically to summarize performance and
- Rewarding outstanding performance

Learning Method

Approach
We use an approach that respects the availability and learning styles of our employees, allowing them to pick and choose activities and modules that work for them while still delivering the learning they need. This can include, but is not limited to, self-assessment surveys, listening to podcasts, watching and responding to video-based instruction, attending in-class instructor-led workshops, and engaging in role-playing. Participants will practice a variety of performance management techniques with interactive exercises and group discussion. It will be a blended learning program with ready-to-use guides, tools, eLearning modules, and resources.

The learning will be:
- Delivered in an enthusiastic and engaging way that will involve all participants
- While consistent with the plan, the learning will be flexible and responsive to the needs of the participants
- Highly practical, structured, and organized — focused on application

Once we have the learning developed, we will give Appointing Authorities an opportunity to test it before implementing it with their staff. When the feedback is incorporated, we’ll establish a schedule for rolling out the learning and set benchmarks for completion.

We will encourage Performance Management Champions (managers as role models) to present segments of the learning. Also having the organizations senior level leaders kick off each session reinforces employee perception that leadership is committed to the success of the performance management program.

Phase 1 – Design Performance Management Framework and Roll Out to Supervisory Employees (approximately 600)

Steps
- Define and design a high-level program which will include performance management philosophy and recommended steps
- Select a pilot group to participate in Phase 1 of the program (benefits: collaborate with peers on a fast-paced project; improve manager effectiveness; higher employee engagement and higher productivity)
- Recommend Appointing Authorities participating in the learning prior to the kick-off, or as part of the pilot group to provide continuous feedback for process improvement
- Design learning tools for managers and employees
- Assess ULearnIT (online learning) to see if it meets organizational needs
Performance Management Framework: Investing in a Better Future

- Review specific core competencies to create a model that can be broadly applied (e.g. customer focus, ensures accountability, communicates effectively, instills trust and situational adaptability)
- Create the Competency Anchored Rating Scales (CARS)
- Create a robust change management plan for implementation
- Gain line level sponsorship

Plan design

- 12 hours of instruction including
  - 4-hour instructor-led course
  - 4-hour online modules
  - Pre (2-hour) and post (2-hour) work
- Options for additional development
- There are approximately 600 supervisors and managers throughout the organization if we limit the group size to 24 participants with 4 instructors, we will complete this phase in 2.5 months.
- Human Resources subject matter experts will be available to consult and assist managers throughout the year

Phase 2 – Communicate Performance Management Program to Non-Supervisory Employees (approximately 2,500)

Expose all employees, not just those conducting reviews, to the need for two-party (supervisor/employee) commitment to the process and ownership of it. We recommend a 3-hour session which fulfills:

- Employees understanding and questioning the performance management process
- Employees understanding their accountabilities and role in the process

We anticipate that this initiative will take 9.5 months to complete.

When

We plan to complete both Phase 1 and 2 no later than December 31, 2020.

Where

Various venues throughout the County. More details to follow upon confirmation of room availability.

Measures of Success

The success in meeting the objectives would be measured by factors which include:

- Creation of developmental plans for all employees evaluated
- Improvement in performance measures during the year following the first review period
- Evaluations are performed and submitted by deadlines
Performance Management Framework:
Investing in a Better Future

- Reduction of grievances/reviews requested over disagreements in evaluations, indicative of growing trust
- Random sampling (survey) of employees indicating acceptable feedback sessions (see Appendix A)

Conclusion

In designing performance management programs
- No system will work without good communication
- There is no one right answer
- Employee involvement is crucial to success
- Employee feedback and linkages are critical
- Centralized philosophy with some flexibility for customization is needed

There is no silver bullet in performance management. What is important is to drive more effective conversations, provide timely feedback with structure, enhance staff engagement, and build a culture founded on trust, purpose, and values.

As with any change, we will move at a pace each organization can sustain and consider the full scope and implications of any recommendations as we do so.

Appendices

- Appendix A – Performance Review Survey
- Appendix B – Culture Scan
- Appendix C – Appointing Authority Meeting 5/14/19 Merit Pay Discussion
Appendix A: Performance Review Survey

Instructions: Now that you have completed your performance review discussion, we’d like to get some feedback on how well the entire process worked for you. Your individual answers will be used on an anonymous, compiled basis to identify areas for improving the performance management system.

1. Did your supervisor conduct a performance planning meeting with you?
   __Yes
   __No

2. How effective was the performance planning meeting in helping you understand the important competencies, key job responsibilities and goals for your job?
   __We did not have a performance planning meeting
   __Somewhat effective—casual discussion; no clear resolution of goals, responsibilities, development plans
   __Effective—clear resolution of goals, responsibilities, development plans
   __Highly effective—thorough analysis and discussion of all elements of my job

3. How long did the performance planning meeting last?
   __No performance planning discussion
   __Less than 15 minutes
   __About 30 minutes
   __About an hour
   __More than an hour

4. Did you establish a development plan?
   __Yes, a formal plan with specific goals and a written plan of action
   __Yes, an informal plan with no formal goals or written plan of action
   __No

5. How successful were you in completing your development plan?
   __I did not establish a development plan
   __Unsuccessful—I did not accomplish the development goals I set
   __Somewhat successful—I accomplished some/most of the goals I set at the beginning
   __Fully successful—I accomplished exactly what I set out to do or more
6. Did you get useful and regular feedback on your job performance and results from your supervisor?
   __No
   __Little, or only when I asked for it
   __Occasional, but I would have liked more
   __Met my needs and expectations
   __Exceeded my expectations

7. How useful was the performance appraisal discussion with your supervisor in helping you understand your strengths and improvement needs and how to best succeed in your job in the future?
   1  2  3  4  5  (1 - not at all useful; 5 - very useful)

8. How would you describe your supervisor’s participation in the performance management process?
   __He/she did not engage in performance management activities
   __Followed only the mandatory requirements. Awkward
   __Little input
   __Good solid support and participation. Useful input
   __Enthusiastic and active supporter. He/she made it a “big deal.” High value input

9. All things considered, how useful was the performance management process in helping you understand what was expected of you and how to best succeed in meeting those expectations?
   1  2  3  4  5  (1 - not at all useful; 5 - very useful)
“Some men see things as they are and say, why; I dream things that never were and say, why not.”

George Bernard Shaw as quoted by Robert F. Kennedy
Introduction

Employee engagement is discussed broadly in organizations. We hear often that the people who staff organizations are our most valuable resource. As we prepare for our 2019 bi-annual Employee Voice Survey, we will see trends from data over three consistent opportunities for feedback with the survey instrument. Let’s explore the culture of our organization.

We have much to be proud of in our organization. Nine out of ten employees would recommend Pinellas County as a great place to work. Ratings have improved overall. Organizations that move from very good to great in all industries are led by collective leadership who want to take a daring look behind the scenes into what shapes their culture. This is the ‘real stuff’ that impacts outcomes in all areas.

Culture impacts: attraction, promotion, retention, motivation, inclusion, productivity, decision-making quality, trust, customer satisfaction, resilience, creativity, stewardship, ethics, strategy and is the air we breathe when in any group of people. It is the way we relate, the unspoken rules and the real driver of actions/behaviors. Policies and rules are written guidelines; while culture determines what and how things really happen.

For many decades, leading culture researchers, organizational psychologists and social scientists have scientifically validated what is showing up in work cultures across western civilization. The U.S. workplace has a leadership crisis, and it is decades in the making. We now have five generations in the workplace, and there is a mixture of leadership philosophies and modus operandi, leading to ambiguity for employees. People seek meaning in their work and want to be part of the solution...especially in service industries.

There is cynicism around formal leadership in many organizations, because needed supporters and partners are seeing incongruences between what is espoused and what actually takes place. (People believe what people do, not what they say.) If we draw a parallel to this dynamic and the results of the last Voice surveys, employee grievances, disciplinary action, dialogs with employees and supervisors, formal mediations and custom organizational development interventions, we can learn from the common threads.

Modeling

The mentality and character we desire from employees must be practiced at all levels of formal leadership. This is most likely to occur when modeled consistently. If organizational leadership desires resiliency, flexibility, collaboration and individual responsibility/accountability...then each of us in leadership for Pinellas County has to demonstrate this within their part of the organization and in collaboration with all other partners. If something goes well, we spread the accolades and share the credit. If something does not go well, we accept responsibility and help each other succeed, refraining from blame.

In a culture where constructive debriefing and learning occur, we encourage exploration and transparency of areas of needed improvement. It is much more likely that people will admit areas of needed improvement when debriefing and sharing responsibility for mistakes is a part of the culture. The more scapegoating happens, the more people fear revealing mistakes.
Clarity of Expectations - Performance Management

We grow up spending most of our time in formal education, skill development and on the job training learning about technical skills needed for jobs we pursue. The vast majority (over 90%) of derailments, performance issues and conflicts in the workplace take place because of interpersonal behaviors and/or lack of self-awareness. This includes all positions, from CEOs to front line employees.

When faced with a need to take action with an employee, many people have been aware of challenges long before it is formally addressed. Peers are aware. Supervisors are aware. There has most often been much time elapsed between when it was first recognized as a “blip on the screen” until it becomes a much larger obstacle to overcome. By this time, there is a much broader impact on performance and outcomes. Yet, many times, very little is documented and the tough constructive conversation has not taken place.

Behavior is a part of performance. They are not separate. If an employee at any level can perform tasks well, yet does not “play well with others,” this is a performance issue. A tried and true rule of thumb is to ask ourselves, “If this were on the front page of the paper or the news broadcast, would I be ok with the public knowing?”

Real scenarios from Employee Relations: We see that tough conversations are not happening across the organization. What do we mean by this?

- When someone approaches Employee Relations, they might paint the picture of an ongoing problem with an employee’s performance.
- This employee has nothing indicated in their performance evaluations describing areas of needed attention.
- When talking to the supervisor, they describe a situation where the employee was moved under them with the awareness that areas of challenge had not been addressed by prior supervision and management (inherited and passed on).
- Other employees are reacting because they are taking on greater workloads while some are moved to the side and allowed to underperform.
- Tough conversations do not happen, then we examine the long-term culture that enabled this to unfold.
- Other evidence of difficulty with candor:
  - Difficulty communicating unfavorable news.
  - An employee or supervisor reacts overtly and disrespectfully in rooms of people and everyone in the room “normalizes” the behavior...yet wonders why we get complaints of negative customer service in parts of the organization. What we allow, gets repeated. If we allow inappropriate behavior, even in an informal setting, it is rewarded if someone is given something they deem beneficial when they are the “squeaky wheel.” It feels easier to appease, yet what are the broader implications of inequity?
  - “That’s just Melanie. That’s just Grady. We know how they are, so we just work around them.”
Subtle and passive/aggressive behavior that works to keep the culture the same…
“If you stand up and hold people accountable, then we will give you poor reviews and say that you don’t care about employees”. We will like you if you continue on in the vein in which we have been operating. If you create change, we will find a way to alienate you (Social Learning Theory—one of the most powerful influences of culture).

As leaders, our strategic work in this scenario should be painting the picture of the ongoing impact of not addressing issues, and not holding ourselves responsible across the organization for individual and leadership accountability. What does personal responsibility in all positions look like? How do we show the data and produce the business case for this level of responsibility? What are the implications for each AA if we do not move in this direction?

This is just the beginning of discussing how we each can reframe to address root causes, become true solution partners, and begin making changes to see different results. We can influence others through making a case for “what’s in it for them” to operate differently to encourage overall organizational effectiveness.

Are we attracting, hiring, promoting, rewarding and recognizing the total package for what is needed in positions? If you have a coachable, aligned, personally-responsible individual who can learn the job, we are much better off than hiring and retaining task masters who do not practice the service-oriented and self-aware behaviors needed for dedicated community servants.

**Candor and Feedback**

One measure of effective leadership in workplace cultures is how candid people are in their discussions. Do the conversations in groups and among decision-makers match the same candor in water fountain dialog? Are people willing to have discussions about the “elephant in the room” to constructively resolve obstacles? This is healthy assertiveness. Is this rewarded and encouraged?

Does feedback happen in all directions? Across? Down? Up? Outward? Inward? Do formal leaders seek the unheard voices that might share unrecognized barriers? When we are approached by ‘hard to hear’ information, do we remain curious or do we inadvertently shut down the messenger? Ideally, feedback occurs naturally in all directions; and we are not surprised by surveys. Anonymity and confidentiality become less of a concern because trust has been built over time, and all leadership understands their role in growing this type of culture.

**Customer Service, Delegation and Coaching**

With all needed competencies across the organization and within specific roles, there is an “underdone” and an “overdone.” For example, we want to be the model of customer service. What does this mean? Have we made this come to life for each role? What does it look like when people are hitting the mark and have that balance?

If underdone, there may be a lackadaisical demeanor from an employee which communicates to the customer that they are not important. It could be a cold handoff when someone calls the wrong number or is looking for another office within the County. It could be walking through the
door with someone carrying something behind you, and you do not stop to hold the door as they carry files down the hallway.

If overdone, the person may have ample time to serve the customers in queue each day as long as time is managed well, and according to organizational priorities; yet, this employee checks and rechecks small tasks beyond reason; and spends two hours in a meeting on a topic that could have been handled in thirty minutes. When people look busy, do we make sure we are all good stewards of time, resources and focusing on our true strategic priorities?

Effective delegation requires us all to push decision-making downward, resulting in a greater level of growth and fulfillment for all levels as well as allowing more prompt delivery of outcomes. Is everyone working within their level of classification? Do supervisors and managers take a broader, more strategic vantage point as they move upward? True succession planning originates and occurs daily in each workgroup. Are contingencies created through cross-training and knowledge sharing long before someone announces retirement?

Coaching is the role of every supervisor and manager. Many peers can be just as effective in helping develop each other, if the culture is supportive of collaboration versus competition. This requires intentional effort and less individualism. Are these competencies assessed before promotions take place?

When hiring for vacancies, do we evaluate what is needed in the position? Are other KSAs (knowledge, skills and abilities) needed? Is it the same classification? Where are our gaps? What do we need that we don’t have represented, related to diversity and inclusion?

**Call to Action**

We can intentionally create the culture needed to produce the service orientation and servant leadership in which Pinellas County moves forward to be the best we can be collectively.

As a reminder, the following are highlights of important work from the Pinellas County Appointing Authorities Advance on February 15, 2019:

**Management Style**
1. Servant leadership
2. Developing staff
3. Accountability

**Work Environment**
1. Meaningful work
2. Respectful
3. Transparency

**Community**
1. Understanding connection of each role to the Vision
2. Understanding impact of what we do daily
3. Dignity in work and respect for contributions
Work-Life Balance
1. Flexibility of schedules
2. Personal well-being
3. Realistic expectations

Employee Well-Being
1. Safe environment (physical and mental)
2. Work/life balance
3. Benefits

Benefits and Rewards
1. Education on financial/retirement plan
2. Overall insurance plan
3. More choices (voluntary benefits)

Cash Compensation
1. Pay for performance
2. Market driven/competitive
3. Developmental opportunities

Career Development
1. Succession planning
2. Leadership development
3. Diverse developmental paths

The themes for intentional positive culture development surfaced in these top areas of consensus from the Appointing Authorities Advance, the results of Employee Relations interactions, and the bi-annual Employee Voice Survey. As summarized in this organizational culture scan, the primary areas of focus for alignment overall are leadership role modeling, clarity of expectations for performance aligned with Vision, accountability with candor and feedback, and customer service with effective delegation.

Action plans for each primary focus area will be important for follow-up work from the survey. As well as customized plans for each area of the organization, it is important for formal leadership to come to consensus on intentional cultural alignment and the steps involved to actualize.
References and Resources

- Real Time Record – Appointing Authorities Advance
  - www.pinellascounty.org/hr/publications/annual-reports/annual-report-2018.pdf
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)
2019 Employee Voice Survey Preliminary Results

Goal was to increase participation rate to 75%. Actual completion rate was about 83% as compared to 74% in the last employee survey in 2017.

<table>
<thead>
<tr>
<th>Appointing Authority</th>
<th>8/27/2019</th>
<th>Final 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCC: County Administrator</td>
<td>83.9%</td>
<td>71.0%</td>
</tr>
<tr>
<td>BTS: Business Technology Services</td>
<td>81.3%</td>
<td>59.0%</td>
</tr>
<tr>
<td>CAO: County Attorney Office</td>
<td>90.9%</td>
<td>91.0%</td>
</tr>
<tr>
<td>CCC: Clerk of the Circuit Court</td>
<td>91.5%</td>
<td>82.0%</td>
</tr>
<tr>
<td>HRD: Human Resources Department</td>
<td>91.9%</td>
<td>94.0%</td>
</tr>
<tr>
<td>OHR: Office Human Rights</td>
<td>60.0%</td>
<td>80.0%</td>
</tr>
<tr>
<td>PAO: Property Appraiser</td>
<td>87.5%</td>
<td>81.0%</td>
</tr>
<tr>
<td>PPC: Forward Pinellas</td>
<td>93.8%</td>
<td>100.0%</td>
</tr>
<tr>
<td>SOE: Supervisor of Elections</td>
<td>91.4%</td>
<td>87.0%</td>
</tr>
<tr>
<td>TCO: Tax Collector’s Office</td>
<td>52.6%</td>
<td>60.0%</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>82.8%</strong></td>
<td><strong>74.0%</strong></td>
</tr>
</tbody>
</table>
## 2019 Employee Voice Survey Communications

<table>
<thead>
<tr>
<th>Date</th>
<th>What</th>
<th>Message medium</th>
</tr>
</thead>
<tbody>
<tr>
<td>6-17-19</td>
<td>Employee Voice web page finalized – web hits: 1,622</td>
<td>Web</td>
</tr>
<tr>
<td>6-17-19</td>
<td>Information session flyer posted to web – web hits: 1,639</td>
<td>Web</td>
</tr>
<tr>
<td>6-17-19</td>
<td>Employee Voice information session promotion in Pen, p. 7</td>
<td>Online newsletter</td>
</tr>
<tr>
<td>6-19-19</td>
<td>EAC Representatives advised of Employee Voice Survey</td>
<td>Meeting</td>
</tr>
<tr>
<td>6-20-19</td>
<td>Promotional flyer (HCP) posted to web – web hits: 251</td>
<td>Web</td>
</tr>
<tr>
<td>6-20-19</td>
<td>Employee Voice Information Sessions email blast to all employees; links to flyer and web page</td>
<td>Email blast, flyer, web</td>
</tr>
<tr>
<td>6-25-19</td>
<td>Employee Voice Info Sessions reminder emailed to all employees</td>
<td>Email</td>
</tr>
<tr>
<td>7-2-19</td>
<td>Two-Minute Tuesday (HCP and HR) – web hits: 729</td>
<td>Email, video</td>
</tr>
<tr>
<td>7-17-19</td>
<td>Article Why You Ought to take the Employee Voice Survey August 12 referencing accomplishments by all Appointing Authorities as result of 2017 survey – web hits for July Pen: 3,633</td>
<td>Online newsletter</td>
</tr>
<tr>
<td>7-17-19</td>
<td><em>Pen</em> promotion of Information Sessions</td>
<td>Online newsletter</td>
</tr>
<tr>
<td>7-19-19</td>
<td>Distributed over 170 posters plus a smaller flyer to 56 contacts and multiple locations around the County, and posted to web – web hits: 121</td>
<td>Poster</td>
</tr>
<tr>
<td>7-23-19</td>
<td>Developed and distributed Supervisor Toolkit with FAQs, resources and recommendations; emailed to all UPS supervisors (601) – web hits: 437</td>
<td>Email, web page</td>
</tr>
<tr>
<td>7-25-19</td>
<td>Presentation for EAC Delegates (HCP)</td>
<td>Meeting</td>
</tr>
<tr>
<td>7-25-19 to 7-27-19</td>
<td>HCP hosted 9 Information Sessions with approximately 300 total attendees</td>
<td>Meetings</td>
</tr>
<tr>
<td>8-5-19</td>
<td>Leadership Notes article <em>Leadership Role in Engagement</em> reminding of importance, encouraging supervisors to enable staff to take survey; sent to all UPS supervisors and subscribers, web hits: 199</td>
<td>Online newsletter</td>
</tr>
<tr>
<td>8-9-19</td>
<td>Presentation for Exempt employees meeting (HCP)</td>
<td>Meeting</td>
</tr>
<tr>
<td>8-12-19</td>
<td>3,086 emails to all employees with individual link to survey (HCP)</td>
<td>Email</td>
</tr>
<tr>
<td>8-12-19</td>
<td>3,086 emails to all employees to remind and clarify what to do if survey link not received (HR)</td>
<td>Email</td>
</tr>
<tr>
<td>8-15-19</td>
<td>Promotion in Pen, p. 3</td>
<td>Online newsletter</td>
</tr>
<tr>
<td>8-19-19</td>
<td>1,300 reminder emails sent to those who have not yet opened the first email (HCP)</td>
<td>Email</td>
</tr>
<tr>
<td>8-20-19</td>
<td>115 reminder emails sent to those who had opened the email but not completed the survey (HCP)</td>
<td>Email</td>
</tr>
<tr>
<td>8-21-19</td>
<td>846 reminder emails sent to those who still had not opened email (HCP)</td>
<td>Email</td>
</tr>
<tr>
<td>8-26-19</td>
<td>Final reminder sent to all incompletes and non-participants (HCP)</td>
<td>Email</td>
</tr>
<tr>
<td>10-14-19</td>
<td>Appointing Authorities receive results from HCP</td>
<td>Email</td>
</tr>
<tr>
<td>October/November</td>
<td>HCP to meet with each Appointing Authority individually; appointments scheduled for late October/early November</td>
<td>Meetings</td>
</tr>
<tr>
<td>11-15-19</td>
<td><em>Pen</em> cover article announcing UPS overall results</td>
<td>Online newsletter</td>
</tr>
</tbody>
</table>

*Web hits are 2019 year to date as of 8/27/19*
My Personalized Total Compensation Statement
as of June 1, 2019

Total Benefits & Compensation

This Personalized Total Compensation Statement shows the total value that your Appointing Authority contributes towards your annual wages (includes paid time off), health benefits, financial protection, and retirement benefits.

- Annual Wages: $45,000.00
- Health Benefits: $21,178.80
- Financial Protection: $1,890.73
- Retirement Benefits: $7,159.50

My Total Compensation: $75,229.03

Prepared for
John A Doe

Paid Time Off

Your annual leave accrual is based on your years of service. In addition, Pinellas County recognizes up to 11 paid holidays, up to 4 floating holidays, and up to 2 personal days. Visit www.pinellascounty.org/hr/leave for more information.

To view your current leave balance, visit OPUS Employee Self-Service, Absence Management, Entitlement Balances.

Total Health Benefits: $9,634.40
Financial Protection: $523.52
Retirement Benefits: $4,792.50

Your Total Compensation: $75,229.03

* Includes Employee Assistance Program, behavioral health benefits, pharmacy and vision benefits.
Compensation Package
Your Appointing Authority contributes to your health benefits (including medical, vision, dental, pharmacy, and behavioral health), plus your Florida Retirement System (FRS) plan, life insurance, disability insurance, reemployment assistance, and workers’ compensation. Pinellas County also provides other valuable benefits such as:

• Annual Leave Exchange (up to 160 hours)
• Career Development including Learning Paths and ULearnIT
• Employee Assistance Program (EAP)
• Employee Discounts
• Family Medical Leave
• Learning Opportunities (over 100 free courses available)
• Pinellas Federal Credit Union
• Referral Program (earn a paid day off when a referral is hired)
• Rewards Program (points awarded for service and wellness activities)
• Suggestion Awards (up to $2,500)
• Tuition Reimbursement (up to $2,800 for full-time and $1,400 for part-time employees per fiscal year)
• Wellness Center and two Satellite Fitness Centers
• Wellness Incentives (up to $200 or 50,000 rewards points per year)
• Wellness Education, Workshops, and Health Screenings
• Annual Leave Exchange (up to 160 hours)
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• Wellness Education, Workshops, and Health Screenings

Opportunities to Save Money Now
Deferred Compensation Account – Deferred compensation helps you build personal retirement income to supplement Florida Retirement System and Social Security benefits. Start with as little as $10 per paycheck to be deposited into an account with numerous investment choices. You may enroll or change your contribution throughout the year. You will only pay taxes on this money when you draw it out after separation of service with the County.

Opportunities to Save Money at Annual Enrollment
Each of the following programs has tax advantages to help you save money and, as a result, enhance your total compensation. Consider participating during the next Annual Enrollment opportunity this fall.

Flexible Spending Account (FSA) – An FSA allows you to pay for eligible out-of-pocket health care and dependent daycare expenses with money you contribute through a payroll deduction on a pre-tax basis. The minimum contribution is $260/year if participation is elected.

Health Savings Account (HSA) – An HSA allows you and the County to contribute pre-tax money to an account linked to the Consumer Driven Health Plan. The County contribution is $400 for an employee or $1,200 for a family. The funds may be used for qualified expenses or saved for future use.

Pre-Tax Deductions – Selecting pre-tax deductions allows your medical and dental premiums to be deducted from your paycheck before federal income and Social Security taxes are applied, which could reduce your taxable income.

Benefits Selection
You may view your current coverages and rates at any time in OPUS by selecting Employee Self Service and Benefits. You have an opportunity to review your benefits and make changes each fall during Annual Enrollment or after a qualifying change of status event such as getting married.

For more information, visit our Human Resources website at www.pinellascounty.org/hr/WhatWeOffer.

About Your Statement
This benefit statement provides descriptions of Pinellas County Government’s benefit plans based on information available from Pinellas County’s records, summary plan descriptions, policy manuals, and other sources of data. Complete details of each plan are set forth in the individual plan document and/or Certificate of Insurance. If there is any conflict between the information in this statement and a plan document, the plan document will control. The information contained herein does not constitute an insurance certificate or policy. The wage information and required benefit programs on this statement are based on information available as of June 1, 2019. If you worked less than 12 months, your data was annualized. Recent changes in salary and/or benefit elections will not be reflected in this statement.
Call to Order
The EAC Delegate meeting was called to order at 8:05 a.m. by Chair Lisa Arispe.

Doing Things! TV – Red Tide Response
Lisa Arispe played a short video titled Doing Things! TV – Red Tide Response which is being used in other counties and states to show the efforts that Pinellas County used to combat Red Tide. During fall 2018, Pinellas County successfully responded to the area’s worst red tide bloom in over a decade. This was accomplished through Public Works Environmental Management's operational leadership, along with strong collaboration among coastal partners, municipalities and county departments including: Solid Waste, Parks and Conservation Resources, Marketing and Communications, Emergency Management, Convention and Visitors Bureau, and Economic Development.

The video is available for viewing at: https://www.dropbox.com/s/r31yo8xj3c99b7c/Doing%20Things%21%20Red%20Tide%20Response.mp4?dl=0

Comments from Holly Schoenherr, Director of Human Resources
- Merit Pay – Every person in the room was given a Response Card RF LCD so that they could answer a series of questions anonymously. Holly Schoenherr asked each question and possible answers. Kevin Connelly displayed the results of each of the questions on the overhead projector, and the results were discussed as a whole.

The questions that were asked were asked were:
1) An ideal process will result in ___% of employees receiving a merit increase?
2) To be meaningful a merit increase should be at least ___% of base salary?
3) A successful merit pay program implementation is the responsibility of: __________?
4) My supervisor is _______ when it comes to fairly, honestly, and constructively evaluating my performance.
5) The primary purpose of merit pay is: ______________.

- The Appointing Authorities agree that they need to come up with a good plan for merit pay. This will require a good length of time and a lot of work to make sure that we have a system that is fair, consistent, and works for everyone. They also have to look at the cost associated with the implementation and determine if there will be merit and across the board increases. It will be the responsibility of each Appointing Authority to make sure that all supervisors are completing performance reviews and hold those who aren’t accountable. We will also have to make sure that our Supervisors and Managers have adequate training so that performance reviews are done well.

Guest Speakers – Paul Valenti and Jeffery Lorick, Office of Human Rights
• Paul Valenti responded to the previous discussion to say Merit Pay is a challenging process that will require a lot of time and consideration.

• Office of Human Rights:
  o Conduct internal investigations on Anti-Harassment
    ▪ Take complaints on bullying and forward them to Human Resources for investigation – Human Resources takes complaints on Anti-Harassment and forwards them to the Office of Human Rights
  o Discrimination in housing
  o Discrimination in employment
  o Other Government Compliance (grants)

• Bullying Policy – Not necessarily the Appointing Authorities that have an issue with implementing the bullying policy, but instead that it gets lost through the channels.

• Implicit Biases – There are outside factors that affect the way that people view the world. Diversity and Inclusion Training will show employees what their individual Implicit Biases are and why they have them. Knowing your Implicit Biases does not make you a bad person, but instead can help you to know what they are, why you have them, and how to improve them.
  o Working with Appointing Authorities and Human Resources to bring the training to employees
  o 2 hour training – you can ask your management to have the training brought to your office or work location
  o Office of Human Rights: 727-464-4880

Open Discussion

• EAC Appointee to the Personnel Board – The EAC appoints two members to sit on the Personnel Board. Unfortunately due to personal reasons, Keith C Dekle is unable to finish out his term. The EAC Representatives elected Paul Rogers to finish out the remainder of Mr. Dekle’s term during our April Meeting.

• EAC/AA Meeting – We had a joint meeting with Appointing Authorities where we discussed Merit Pay, the Benefits Committee, Wellness Programs, and Paid Parental/Caregiver Leave.

Adjourned
Meeting adjourned at 9:45 a.m., so that Representatives could meet with delegates from their sections.

| Lisa Arispe* | Donna Beim | Linda Cahill | Richard Carvale* | Kevin Connelly* |
| Leena Delli Paoli* | Henry Gomez* | Bill Gorman* | Clare McGrane* | Doris McHugh* |
| Marion Nuraj* | Randy Rose | Ashley Skubal* | Christian Steiermann* | Charles Toney* |

*EAC Representatives in attendance at this meeting.
Employee engagement is discussed broadly in organizations. We hear often that the people who staff organizations are our most valuable resource. At the conclusion of the 2019 bi-annual Employee Voice Survey, we will see trends from data over four consistent opportunities for feedback (2013, 2015, 2017 and 2019) with the survey instrument.

People seek meaning in their work and want to be part of the solution, especially in service-based industries. If organizational leadership desires resiliency, flexibility, collaboration and individual responsibility, then each of us in leadership for Pinellas County has to demonstrate this within their part of the organization and in collaboration with all other partners. If something goes well, we spread the accolades and share the credit. If something does not go well, we accept responsibility and help each other succeed, refraining from blame.

Are we attracting, hiring, promoting, rewarding and recognizing the total package for what is needed in positions? If you have a coachable, aligned, personally-responsible individual who can learn the job, we are much better off than hiring and retaining task masters who do not practice the service-oriented and self-aware behaviors needed for dedicated community servants.

Effective delegation requires us all to push decision-making downward, resulting in a greater level of growth and fulfillment for all levels as well as allowing more prompt delivery of outcomes. Is everyone working within their level of classification? Do supervisors and managers take a broader, more strategic vantage point as they move upward? True succession planning originates and occurs daily in each workgroup. Are contingencies created through cross-training and knowledge sharing long before someone announces retirement?

Organizations that move from very good to great in all industries are led by collective leadership who want to take a daring look behind the scenes into what shapes their culture. This is the “real stuff” that impacts outcomes in all areas.

We ask you to encourage your employees to complete the Employee Voice Survey so that we can take a daring look behind the scenes and hear the unheard voices. Human Resources has created a Supervisor Toolkit of resources to help you.

The Employee Voice Survey commences August 12. Let’s encourage our employees to be part of the solution.
Human Resources
Organizational Development (OD)

Unified Personnel Board Meeting
September 5, 2019
What is Organizational Development (OD)?

OD is a philosophy and mindset

1) Planned effort
2) Organization-wide focus
3) Managed from top down and bottom up
4) Increases organizational effectiveness and health
5) Planned interventions in organization’s “process”, using behavioral-science knowledge
Framework of OD

“No action without research, no research without action.”

Kurt Lewin
Other Framework in OD

- Individual
- Team
- Whole Organization
OD Intervention Cycle

- Desire to Improve or Change
- Investigate the Problem – Need to Change
- Explore Solutions & Benchmarks
- Design Intervention & Results Expectation
- Implement Intervention
- Evaluate Performance & Learning
Delivering OD...the OD Hub

Newly created interdisciplinary team comprised of six members from:

- Learning & Development
- Planning & Performance
- Workforce Strategy

Develops competencies across HR as trusted solution partners
OD Focus on Increasing

- Interpersonal trust
- Satisfaction & commitment
- Problem solving capabilities
- Managed interpersonal conflict
- Cooperation & collaboration
- Efficient and effective process improvement
OD Professional Competencies

- Accountability and integrity
- Collaboration and teamwork
- Organizational acumen
- Problem solving and decision making
- Process and project management
Why is OD Important?

- Provides better impact in achievement towards organizational goals
- Increases trend to maximize an organization’s investment in its employees
- Organizations need to “work smarter” and apply creative ideas
- Customers demand continually improving quality
OD Achievements

- Continued support of action plans related to Employee Voice Surveys
- Process mapping
- Culture scan
OD Achievements

Leadership development
- How to master strategic thinking
- Break down silos: promote collaboration
- Competency-based learning: why talent management needs to get onboard
- The what, why & how of leadership development
- Align values and behaviors for a healthier workplace culture
Any Questions?
Thank You