



HUMAN RESOURCES

FY23-24 BUDGET PRESENTATION



FY22-23 Major Accomplishments

| AREA | DESCRIPTION |
|----------------------------------|--|
| Director's Office | Focused on service delivery across all HR programs to improve County department's experience with Human Resources. Conducted an impartial evaluation of all HR program services and operating models. Partnered with local consultant to revise/create 44 County employment policies; companion resources for managers/supervisors include the creation of ten (10) learning modules and a high-level supervisor guide to provide just-in-time information. |
| Workforce Data Management | Provided technical system support for the following Countywide initiatives - preparing to implement the new Oregon Paid Leave law, continuing to comply with the Oregon Equal Pay Act provisions, and planning to outsource the County's benefit administration program. Also provided system support for all HR program areas. |
| Employee & Labor Relations | Negotiated with four (4) of eight (8) County contracts - AFSCME CCOM, DTD, and WES, and the Federation of Parole and Probation Officers (FOPPO) for successor contracts effective through June, 2024. Preparing for negotiations with the Clackamas County Peace Officers Association (CCPOA). |
| Classification & Compensation | Completed, communicated, negotiated, and implemented the Equal Pay Analysis recommendations, and implemented salary adjustments for over 600 County employees in response to the County's Equal Pay Analysis study. |
| Recruitment & Selection | Significantly reduced the recruitment backlog by partnering with Health, Housing and Human Services (H3S) and County Administration to fund three additional limited-term Recruitment Analyst positions. The recruitment volume has been reduced by 20% since July, 2022 (206 compared to 166, effective April, 2023). |
| Workforce Planning & Development | Experienced great response to expanded countywide learning offerings, with more in person and virtual platforms topics include conflict management, facilitation, mindful communications, organization skills, building trust, change management and mental health/ wellness. Added classroom registration to Learning Management System (Prositons), enabling easier registration and administration. |
| Benefits & Wellness | Completed Phase 3 of Benefits Service Delivery Transformation in order to prepare to implement our service delivery strategy. Improved Leave Administration customer service to departments and employees by adopting a business partner model, addressing the case backlog by establishing new processes, and developing a case management dashboard. |
| Risk & Safety | Workers' compensation claims counts continue to decline, down 30.4% since 2019 and down 4.3% year-over-year, reflecting strong loss control and safety efforts in reducing the number of employee injury accidents across the County. While average claims costs are up, a lower number of claims will ultimately pay dividends in both employee safety and financial impact. Our experience modification rate is currently .77, which is 23% better than the industry average of our peers, reflective of a robust risk and safety program. |

Performance Clackamas

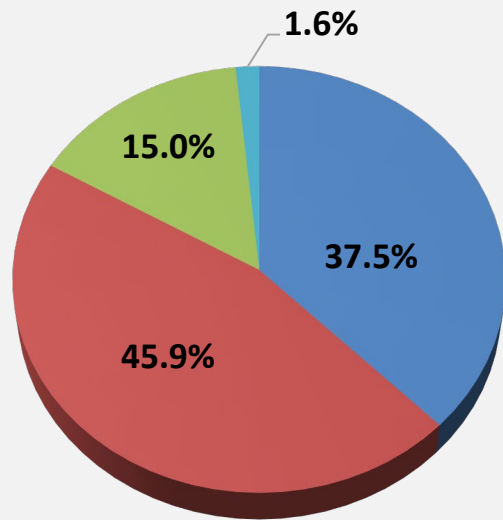
| Line of Business/Program | Results Measure | FY21-22 Actual | FY22-23 Target | FY22-23 Projected Performance | FY23-24 Target |
|-----------------------------------|--|----------------|----------------|-------------------------------|----------------|
| Director's Office/ Administration | 90% of Clackamas County managers agree or strongly agree that Human Resources is a strategic business partner | 90% | 90% | N/A | 90% |
| Workforce Data Management | 80% of HR Managers, HR Staff, and PA Processors reporting by survey that business and system enhancements have improved their daily operations and achieve strategic results. | 97% | 80% | 95% | 80% |
| Employee & Labor Relations | 90% of corrective actions involving written reprimands, suspensions, demotions and employee terminations will have been vetted with E&LR before imposition. | 100% | 90% | 100% | 90% |
| Classification & Compensation | By 2025, 100% of County classifications will have been reviewed for alignment with County business needs and market comparability within the past five years, and year over year thereafter. | 20% | 35% | 35% | 35% |
| Recruitment & Selection | 70% of open positions are filled within 90 days from the date of requisition. | 52% | 70% | 57% | 70% |
| Workforce Planning & Development | 90% of Learning & Development participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time. | 91% | 90% | 95% | 90% |
| Benefits & Wellness | 90% of supervisor and manager survey responses indicate "agree or "strongly agree" they have timely and accurate information about their employees' protected leaves and disability. | 70% | 90% | NA | 90% |
| Risk & Safety | Clackamas County will maintain a workers' compensation rating below the state's industry average. | 74% | 100% | 100% | 100% |

Program Profiles: FY23-24 Summary

| Line of Business | Program Name | BCC Priority | Total Funds (in Millions) | % County General Fund | % Restricted Funds | Mandate: Fed/State/City /IGA/None | % Program Operated by County | Metrics: % Target Meet/Exceed/ Improve |
|----------------------------|---------------------------------------|--------------|---------------------------|-----------------------|--|---|------------------------------|--|
| Administration | Office of the Director/Administration | Acct Gov't | \$910,376 | 100% | 78% Allocations paid by County departments | Wide range of federal and state employment laws governing us as a public employer, as well as eight collective bargaining agreements, and various employment policies | 100% | 67% |
| | Workforce Data Management | Acct Govt | \$826,977 | 100% | | | 100% | 67% |
| Employee & Labor Relations | Employee & Labor Relations | Acct Govt | \$820,972 | 100% | | | 100% | 100% |
| Workforce Design | Classification & Compensation | Acct Govt | \$1,010,416 | 100% | 22% General Fund Support | | 100% | 100% |
| | Recruitment & Selection | Acct Govt | \$1,611,375 | 100% | | | 100% | 100% |
| | Workforce Planning & Development | Acct Govt | \$591,018 | 100% | | | 100% | 67% |
| Benefits & Wellness | Benefits & Wellness | Acct Govt | \$57,104,362 | 0% | 15% | | 80% | 67% |
| Risk & Safety | Risk & Safety | Acct Govt | \$17,219,768 | 0% | 46% | | 90% | 88% |

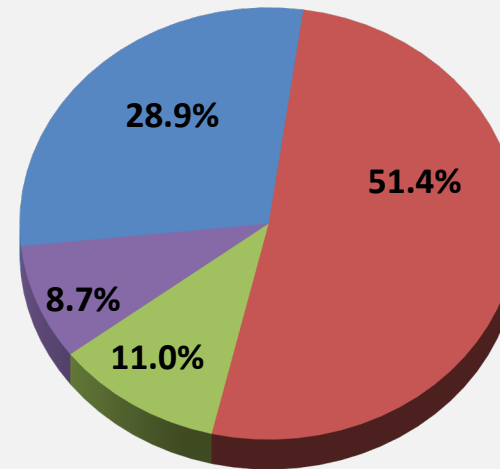
FY23-24 Revenue and Expenses

Revenues



- All Other Revenue Resources
- Beginning Fund Balance
- Charges, Fees, License, Permits, Fines, Assessments
- General Fund Support

Expenses



- Contingency
- Materials and Services
- Personnel Services
- Reserve for Future Expenditures



Human Resources Department (16)

Department Budget Summary by Fund

| Line of Business Name | Program Name | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 |
|---------------------------------------|----------------------------------|--------------------|------------------|---------------------------|-----------------------------|--------------|----------------------------------|-----------|
| | | General Fund (100) | ARPA Fund (230)* | Self-Insurance Fund (760) | Risk Mgmt Claims Fund (761) | Total Budget | General Fund Support in Budget** | Total FTE |
| Administration | Director's Office | 910,376 | | | | 910,376 | 214,764 | 4.0 |
| Administration | Workforce Data Management | 826,977 | | | | 826,977 | 214,764 | 4.5 |
| Employee & Labor Relations Management | Employee & Labor Relations | 820,972 | | | | 820,972 | 214,764 | 3.5 |
| Workforce Design | Classification & Compensation | 1,010,416 | | | | 1,010,416 | 214,764 | 5.0 |
| Workforce Design | Recruitment & Selection | 1,611,375 | | | | 1,611,375 | 214,764 | 9.0 |
| Workforce Design | Workforce Planning & Development | 591,018 | | | | 591,018 | 214,764 | 2.0 |
| Benefits, Wellness, Leave Management | Benefits Administration | | | 5,366,943 | | 5,366,943 | - | 14.3 |
| Benefits, Wellness, Leave Management | Medical Insurance | | | 44,788,297 | | 44,788,297 | - | - |
| Benefits, Wellness, Leave Management | Dental Insurance | | | 4,731,000 | | 4,731,000 | - | - |
| Benefits, Wellness, Leave Management | Disability Insurance | | | 1,475,688 | | 1,475,688 | - | - |
| Benefits, Wellness, Leave Management | EAP/Wellness | | | 738,552 | | 738,552 | - | - |
| Benefits, Wellness, Leave Management | Deferred Compensation | | | 3,882 | | 3,882 | - | - |
| Risk & Safety Management | Risk Administration | | | | 1,719,025 | 1,719,025 | - | 7.8 |
| Risk & Safety Management | Casualty/Liability | | | | 11,086,763 | 11,086,763 | - | - |
| Risk & Safety Management | Workers' Compensation | | | | 3,902,039 | 3,902,039 | - | - |
| Risk & Safety Management | Unemployment | | | | 511,941 | 511,941 | - | - |
| TOTAL | | 5,771,134 | - | 57,104,362 | 17,219,768 | 80,095,264 | 1,288,584 | 50.0 |
| FY 22-23 Budget (Amended) | | 5,951,933 | 20,000 | 59,416,372 | 17,989,464 | 83,377,769 | 1,465,704 | 50.0 |
| \$ Increase (Decrease) | | (180,799) | (20,000) | (2,312,010) | (769,696) | (3,282,505) | (177,120) | 0.0 |
| % Increase (Decrease) | | -3.0% | -100.0% | -3.9% | -4.3% | -3.9% | -12.1% | 0.0% |

**General Fund Support is the subsidy, net of any other revenue received by the department.

16-Human Resources (HR) / 100-General Fund
Summary of Revenue and Expense

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year-End | FY23-24 Budget | \$ Change from Prior Year Budget | % Change from Prior Year Budget |
|---|----------------------------|----------------------------|---------------------------------------|---|---------------------------|---|--|
| Beginning Fund Balance | - | - | 103,644 | 103,644 | 100,000 | (3,644) | -4% |
| Charges, Fees, License, Permits, Fines, Assessments | 3,753,450 | 3,753,355 | 4,054,669 | 4,054,669 | 4,054,672 | 3 | 0% |
| All Other Revenue Resources | - | 10 | 327,916 | 327,916 | 327,878 | (38) | 0% |
| General Fund Support | - | 1,323,927 | 1,465,704 | 1,340,580 | 1,288,584 | (177,120) | -12% |
| Operating Revenue | 3,772,561 | 5,077,292 | 5,848,289 | 5,723,165 | 5,671,134 | (177,155) | -3% |
| Total Revenue | 3,772,561 | 5,077,292 | 5,951,933 | 5,826,809 | 5,771,134 | (180,799) | -3% |
| Personnel Services | 3,798,486 | 3,984,639 | 4,769,570 | 4,741,153 | 4,965,364 | 195,794 | 4% |
| Materials and Services | 832,535 | 912,382 | 1,182,360 | 985,656 | 805,770 | (376,590) | -32% |
| Operating Expenditure | 4,631,020 | 4,897,021 | 5,951,930 | 5,726,809 | 5,771,134 | (180,796) | -3% |
| Total Expense | 4,631,020 | 4,897,021 | 5,951,930 | 5,726,809 | 5,771,134 | (180,796) | -3% |
| Revenues Less Expenses | (858,459) | 180,271 | - | 100,000 | - | | |

FY21-22: Presentation changes are the result of the new county-wide chart of account implementation.

**General Fund Departments: Starting in FY20-21, amounts in Revenue Less Expenses will be moved into Non-Departmental at year-end.*

16-Human Resources (HR) / 230-Special Grants Fund

Summary of Revenue and Expense

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year-End | FY23-24 Budget | \$ Change from Prior Year Budget | % Change from Prior Year Budget |
|--|--------------------|--------------------|------------------------------|----------------------------------|-------------------|--|---------------------------------------|
| Federal, State, Local, All Other Gifts & Donations | - | 23,506 | 20,000 | 20,000 | - | (20,000) | -100% |
| Operating Revenue | - | 23,506 | 20,000 | 20,000 | - | (20,000) | -100% |
| Total Revenue | - | 23,506 | 20,000 | 20,000 | - | (20,000) | -100% |
| Personnel Services | - | 23,506 | 20,000 | 20,000 | - | (20,000) | -100% |
| Operating Expenditure | - | 23,506 | 20,000 | 20,000 | - | (20,000) | -100% |
| Total Expense | - | 23,506 | 20,000 | 20,000 | - | (20,000) | -100% |
| Revenues Less Expenses | - | - | - | - | - | | |

FY21-22: Presentation changes are the result of the new county-wide chart of account implementation.

16-Human Resources (HR) / 760-Self-Insurance Fund

Summary of Revenue and Expense

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year-End | FY23-24 Budget | \$ Change from Prior Year Budget | % Change from Prior Year Budget |
|---|--------------------|--------------------|------------------------------|----------------------------------|-------------------|--|---------------------------------------|
| Beginning Fund Balance | 17,774,794 | 22,792,734 | 26,671,097 | 24,597,171 | 25,476,496 | (1,194,601) | -4% |
| Federal, State, Local, All Other Gifts & Donations | 10,592 | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 2,134,487 | 1,825,986 | 1,732,490 | 1,983,778 | 1,989,008 | 256,518 | 15% |
| All Other Revenue Resources | 32,485,670 | 30,987,062 | 31,012,785 | 28,357,530 | 29,638,858 | (1,373,927) | -4% |
| Operating Revenue | 34,630,749 | 32,813,048 | 32,745,275 | 30,341,308 | 31,627,866 | (1,117,409) | -3% |
| Total Revenue | 52,405,543 | 55,605,782 | 59,416,372 | 54,938,479 | 57,104,362 | (2,312,010) | -4% |
| Personnel Services | 1,529,903 | 1,276,785 | 2,085,159 | 2,077,086 | 2,331,367 | 246,208 | 12% |
| Materials and Services | 28,082,906 | 29,731,826 | 32,734,179 | 27,384,897 | 35,461,787 | 2,727,608 | 8% |
| Operating Expenditure | 29,612,809 | 31,008,611 | 34,819,338 | 29,461,983 | 37,793,154 | 2,973,816 | 9% |
| Contingency | - | - | 21,593,482 | - | 16,027,969 | (5,565,513) | -26% |
| Reserve for Future Expenditures | - | - | 3,003,552 | - | 3,283,239 | 279,687 | 9% |
| Total Expense | 29,612,809 | 31,008,611 | 59,416,372 | 29,461,983 | 57,104,362 | (2,312,010) | -4% |
| Revenues Less Expenses | 22,792,734 | 24,597,171 | - | 25,476,496 | - | | |

FY21-22: Presentation changes are the result of the new county-wide chart of account implementation.

16-Human Resources (HR) / 761-Risk Management Claims Fund
Summary of Revenue and Expense

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year-End | FY23-24 Budget | \$ Change from Prior Year Budget | % Change from Prior Year Budget |
|---|----------------------------|----------------------------|---------------------------------------|---|---------------------------|---|--|
| Beginning Fund Balance | 13,369,285 | 12,813,277 | 12,664,838 | 12,135,003 | 11,169,390 | (1,495,448) | -12% |
| Federal, State, Local, All Other Gifts & Donations | 18,792 | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 5,029,842 | 5,136,448 | 5,224,626 | 5,104,626 | 6,000,378 | 775,752 | 15% |
| All Other Revenue Resources | 326,761 | 36,740 | 100,000 | 10,000 | 50,000 | (50,000) | -50% |
| Operating Revenue | 5,375,394 | 5,173,188 | 5,324,626 | 5,114,626 | 6,050,378 | 725,752 | 14% |
| Total Revenue | 18,744,679 | 17,986,465 | 17,989,464 | 17,249,629 | 17,219,768 | (769,696) | -4% |
| Personnel Services | 1,402,639 | 1,316,214 | 1,410,925 | 1,409,925 | 1,496,142 | 85,217 | 6% |
| Materials and Services | 3,528,764 | 4,535,247 | 4,817,499 | 4,670,314 | 4,940,183 | 122,684 | 3% |
| Operating Expenditure | 4,931,402 | 5,851,461 | 6,228,424 | 6,080,239 | 6,436,325 | 207,901 | 3% |
| Transfers | 1,000,000 | - | - | - | - | - | - |
| Contingency | - | - | 2,919,040 | - | 7,114,443 | 4,195,403 | 144% |
| Reserve for Future Expenditures | - | - | 8,842,000 | - | 3,669,000 | (5,173,000) | -59% |
| Total Expense | 5,931,402 | 5,851,461 | 17,989,464 | 6,080,239 | 17,219,768 | (769,696) | -4% |
| Revenues Less Expenses | 12,813,277 | 12,135,003 | - | 11,169,390 | - | | |

FY21-22: Presentation changes are the result of the new county-wide chart of account implementation.

Significant Policy and/or Financial Issues

| Description | Impact |
|---|--|
| <p>Legal Compliance</p> <p><u>Oregon Paid Leave</u> – The Oregon State Legislature enacted Paid Leave Oregon in 2019, which allows individuals to take paid time off to care for themselves and their loved ones for qualifying situations. It is funded by contributions from both employers and employees.</p> <p><u>Equal Pay Act</u> - Next critical steps are to revise and implement compensation business practices and technological system enhancements to monitor and maintain pay equity within the workforce and compliance with Oregon law. The next Equal Pay Analysis audit begins in 2024.</p> | <p>County financial resources, electronic systems, collective bargaining agreements, policies, and vendor agreements must all be in place effective September 1, 2023 to ensure compliance with the new Oregon law.</p> <p>There continues to be a significant financial and workload impact to the Classification and Compensation, Employee and Labor Relations, Recruitment, and Workforce Data Management programs to bargain changes in collective bargaining agreements, revising County policies, and upgrading system enhancements to aid the County in staying in compliance with the Equal Pay Act; lack of compliance with the Equal Pay Act would result in financial penalties to the organization.</p> |
| <p>Workforce Support to County Departments</p> <p>Human Resources aids County departments by providing the Human Resources services they need to provide high quality service to Clackamas residents and achieve their business results. These services are especially important during times of budget challenges and the resulting organizational changes. Addressing these demands and maintaining an engaged and productive workforce during times of organizational stress, requires innovation, collaboration, and integrated problem-solving strategies in all program areas of the Human Resources department.</p> | <p>Human Resources staff members have a deep understanding the County organization and continue to provide guidance to all levels of the organization to navigate the complexity of workforce issues that affect County department operations, such as labor contract issues, employment laws and regulations, staffing requirements, compensation needs and challenges, competitive benefits, training managers and supervisors to lead the workforce, and attending to the risk and safety needs of the workforce and the organization.</p> |
| <p>Business Process Operational Efficiency</p> <p>Greater demand for services and limited resources continue to drive the need for HR to gain efficiencies and rethink the way we do business. The Benefits Administration and Workforce Data Management teams will drive these initiatives in the coming year.</p> | <p>Workforce Data Management continues to provide business process and technological solutions to for all areas of HR, requiring partnership with Technology Services and external consultants to meet the demand and develop efficiencies. Completion of the Benefits Transformation Initiative will move the County from transactional benefits administration to strategic managed benefits delivery system.</p> |

Thank you



Human Resources Department (16)

Department Budget Summary by Fund

| Line of Business Name | Program Name | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 | FY 23-24 |
|---------------------------------------|----------------------------------|--------------------|------------------|---------------------------|-----------------------------|--------------------|----------------------------------|-------------|
| | | General Fund (100) | ARPA Fund (230)* | Self-Insurance Fund (760) | Risk Mgmt Claims Fund (761) | Total Budget | General Fund Support in Budget** | Total FTE |
| Administration | Director's Office | 910,376 | - | | | 910,376 | 214,764 | 4.0 |
| Administration | Workforce Data Management | 826,977 | - | | | 826,977 | 214,764 | 4.5 |
| Employee & Labor Relations Management | Employee & Labor Relations | 820,972 | | | | 820,972 | 214,764 | 3.5 |
| Workforce Design | Classification & Compensation | 1,010,416 | | | | 1,010,416 | 214,764 | 5.0 |
| Workforce Design | Recruitment & Selection | 1,611,375 | | | | 1,611,375 | 214,764 | 9.0 |
| Workforce Design | Workforce Planning & Development | 591,018 | | | | 591,018 | 214,764 | 2.0 |
| Benefits, Wellness, Leave Management | Benefits Administration | | - | 5,366,943 | | 5,366,943 | - | 14.3 |
| Benefits, Wellness, Leave Management | Medical Insurance | | | 44,788,297 | | 44,788,297 | - | - |
| Benefits, Wellness, Leave Management | Dental Insurance | | | 4,731,000 | | 4,731,000 | - | - |
| Benefits, Wellness, Leave Management | Disability Insurance | | | 1,475,688 | | 1,475,688 | - | - |
| Benefits, Wellness, Leave Management | EAP/Wellness | | | 738,552 | | 738,552 | - | - |
| Benefits, Wellness, Leave Management | Deferred Compensation | | | 3,882 | | 3,882 | - | - |
| Risk & Safety Management | Risk Administration | | - | | 1,719,025 | 1,719,025 | - | 7.8 |
| Risk & Safety Management | Casualty/Liability | | | | 11,086,763 | 11,086,763 | - | - |
| Risk & Safety Management | Workers' Compensation | | | | 3,902,039 | 3,902,039 | - | - |
| Risk & Safety Management | Unemployment | | | | 511,941 | 511,941 | - | - |
| TOTAL | | 5,771,134 | - | 57,104,362 | 17,219,768 | 80,095,264 | 1,288,584 | 50.0 |
| FY 22-23 Budget (Amended) | | 5,951,933 | 20,000 | 59,416,372 | 17,989,464 | 83,377,769 | 1,465,704 | 50.0 |
| \$ Increase (Decrease) | | (180,799) | (20,000) | (2,312,010) | (769,696) | (3,282,505) | (177,120) | 0.0 |
| % Increase (Decrease) | | -3.0% | -100.0% | -3.9% | -4.3% | -3.9% | -12.1% | 0.0% |

**General Fund Support is the subsidy, net of any other revenue received by the department.



Purpose Statement

The purpose of the Human Resources Director's Office program is to provide HR direction, executive consultation and policy decision services to the Board of County Commissioners, County Administrator, County Departments and employees so they can have a strategic partner to achieve their strategic and operational goals.

Performance Narrative Statement

Major Initiatives:

In addition to our strategic efforts to partner with our customers, the two main initiatives for the Director's Office are to update County employment policies, and remove duplicative language from the County Code (Personnel Ordinance), as well as continue to make progress on updating the Internal Complaints business process.

Employee Policy and Practices (EPP)/County Code Integration

Our engagement with a local human resources consulting firm since December, 2020, has resulted in significant progress in our effort to create new and revise existing employment policies so that they are in compliance with federal and state employment laws. To date, our team of consultants and internal staff subject matter experts have made significant edits to 44 Employment Policy and Practices (EPPs). Once edits are complete, next steps include review by County Counsel, Executive Management Team, (EMT), the Policy Committee, and unions, followed by approval by County Administration or the Board of County Commissioners. Simultaneously, employment policy language will be eliminated from the Personnel Ordinance (County Code Section 2.05). The project result will be current policies that are easily accessible by all users.

Internal Complaint Process

In response to a comprehensive audit of the County's practices related to Internal Complaints by the County's Internal Auditor, we have continued to evaluate our processes and apply the recommendations presented in the audit report. Our efforts during this fiscal year include a thorough review of the business process and development of the Internal Complaints module within the Origami database. Utilizing this database will allow us to retain current and historic records in one location, actively manage cases, and reporting capabilities. We will continue to make progress on the specific actions that will address the recommendations during FY 22/23.

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------------|---|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result | By 2021, 90% of Clackamas County managers agree or strongly agree that Human Resources is a strategic business partner. ⁴ | 91% | 100% ¹ | 90% | N/A | 90% |
| Result | 80% of HR Lines of Business managers who report they "strongly agree" or "agree" that Administrative Services helps their line of business to achieve results, is efficient and timely in response, and is proactive in solving problems. | 100% | 100% ¹ | 80% | 100% | 80% |
| Output | Number of revised Employee Policies and Procedures and County Code. ³ | 3 ² | 5 | 12 | 3 | 12 |
| Output (NEW) | Number of Internal Complaints investigated per fiscal year ³ | 13 | 8 | 10 | 3 | 7 |

Performance Measures Narrative:

¹ Our efforts to provide excellent customer service and strategic partner consultative services continue to be well received from internal County customers. We will continue to incorporate feedback to ensure this strong trend continues and evolves with the needs of the County.

² We are only reporting on fully approved and implemented Employment Policies and Practices in the measure above. While we are only reporting five completed policies to in FY 21/22, we had a higher number of revised County employment policies during budget committee hearings late 2022, based on the project plan and consultant firm efforts to date.

³ This data is collected each Fiscal Year in June.

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | - | - | 43,866 | 43,866 | - | (43,866) | -100% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | 19,111 | 8,183 | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 3,753,450 | 725,491 | 629,839 | 629,839 | 695,612 | 65,773 | 10% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | 205,691 | 221,512 | 211,152 | 214,764 | (6,748) | -3% |
| Operating Revenue | 3,772,561 | 939,365 | 851,351 | 840,991 | 910,376 | 59,025 | 7% |
| Total Revenue | 3,772,561 | 939,365 | 895,217 | 884,857 | 910,376 | 15,159 | 2% |
| Personnel Services | 3,798,486 | 724,078 | 622,694 | 621,694 | 684,296 | 61,602 | 10% |
| Materials and Services | 832,535 | 202,066 | 272,523 | 263,163 | 226,080 | (46,443) | -17% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 4,631,020 | 926,144 | 895,217 | 884,857 | 910,376 | 15,159 | 2% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | - | - | - | - | - |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 4,631,020 | 926,144 | 895,217 | 884,857 | 910,376 | 15,159 | 2% |
| Revenues Less Expenses | (858,459) | 13,222 | - | - | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Administration Workforce Data Management

Purpose Statement

The purpose of the Workforce Data Management program is to provide systems management, reports, analytics, and education services to Human Resources, County departments and employees so they can understand and use HR systems and data to make informed decisions and achieve their strategic results.

Performance Narrative Statement

Major Initiatives:

Paid Leave Oregon: Support Benefits, Wellness, and Leaves with the implementation of Paid Leave Oregon effective September 3, 2023.

Equal Pay Act: Support Classification and Compensation in the implementation of pay equity compensation. This included creating tools for the salary placement assessments and reports for C&C to ensure compliance and equitable salary for all employees. WDM continues to collaborate with both the Classification and Compensation team as well as Recruitment and Selection team to develop and streamline processes for equitable salary placement analysis.

Business Process Improvements: Provide system improvements to enhance Recruitment and Selection business processes to be more agile and streamlined. This includes implementing a resume parsing tool, automating the conditional job offer through PeopleSoft, and creating recruitment email templates to improve applicant and hiring manager experience, and HR processes.

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------------|---|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result | 95% of departments submitting Personnel Actions not needing material corrections. | 94% | 94% ¹ | 95% | 97% ¹ | 95% |
| Result (NEW) | 80% of HR Managers, HR Staff, and PA Processors reporting by survey that business and system enhancements have improved their daily operations and achieve strategic results. | 97% | 97% ¹ | 80% | 77% ¹ | 80% |
| Output | Number of data transactions provided | 9236 ² | 7,884 | 7,200 | 20,295 ¹ | 7,200 |
| Output (NEW) | Number of Employee Self Service password resets. | 1,478 | 1,349 | 400 | 212 ³ | 400 |
| Output (NEW) | Number of HR system enhancements. | 13 | 19 | 10 | 6 ³ | 10 |
| Output (NEW) | Number of HR business process improvements. | 4 | 14 | 10 | 9 ³ | 10 |
| Output | Number of Managers and staff trained (removed) | Discontinue | n/a | n/a | n/a | n/a |

The WDM unit processes between 9000-11,000 transactions annually for our employee workforce. This process is highly manual and requires analysis of the transaction against the variety of work rule documents to ensure data quality.

The numbers of transactions fluctuate from year to year based on the implementation of collective bargaining agreements and other large-scale initiatives that influence employee data. Examples include creation of new infrastructure for MFR or the implementation or upgrade of systems impacted by PeopleSoft HCM.

Because the county has many sources for work rules between ordinances, policies, collective bargaining contracts, and other work rules, we find that departments struggle to apply our county work rules consistently. Our current data collection method of Personnel Action review shows that close to 95% of transactions submitted to Human Resources is correct, a 10% from 85% increase since this measure was put in place. One way we've addressed the 15% of transactions that are incorrect is to enhance the PA forms, provide job aids, and training for all the tools available to aid this process. We created a specific series of training courses for PA Processors and managers that we have delivered since fiscal year 16/17.

¹ Calendar year data 2022. This data is collected once a calendar year.

² Number pulls date the transaction is processed. Prior to this, it pulled the effective date of the transaction. Thus may not align with prior report.
a quarterly reported measure, data reflects data totals up to Q3.

³ Measure is

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160102-Workforce Data Management
 BCC Priority Alignment: Accountable Government
 Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | - | - | 16,812 | 16,812 | - | (16,812) | -100% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | 20,000 | 20,000 | - | (20,000) | -100% |
| Charges, Fees, License, Permits, Fines, Assessments | - | 602,943 | 658,230 | 658,230 | 612,213 | (46,017) | -7% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | 10 | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | 217,499 | 221,512 | 216,595 | 214,764 | (6,748) | -3% |
| Operating Revenue | - | 820,452 | 899,742 | 894,825 | 826,977 | (72,765) | -8% |
| Total Revenue | - | 820,452 | 916,554 | 911,637 | 826,977 | (89,577) | -10% |
| Personnel Services | - | 738,995 | 777,305 | 752,888 | 746,638 | (30,667) | -4% |
| Materials and Services | - | 139,269 | 139,249 | 158,749 | 80,339 | (58,910) | -42% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | - | 878,264 | 916,554 | 911,637 | 826,977 | (89,577) | -10% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | - | - | - | - | - |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | - | 878,264 | 916,554 | 911,637 | 826,977 | (89,577) | -10% |
| Revenues Less Expenses | - | (57,812) | - | - | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Employee and Labor Relations

Employee and Labor Relations

Purpose Statement

The purpose of the Employee and Labor Relations program is to provide corrective action consultation, administration of collective bargaining and labor contract services to the BCC, County Administration, and Departments so they can manage a productive workforce and maintain effective labor relations.

Performance Narrative Statement

Major Initiatives:

Our goal is to reduce liability to the County regarding employment actions by resolving issues at the lowest levels and partnering with managers regarding employee and labor relations matters in an effort to enhance organizational effectiveness. These activities include the application of policies and contract interpretation and administration; strategizing how to address issues proactively; assisting with workplace conflict resolution; responding to employee performance issues and grievances; and providing guidance and training on collective bargaining agreements, policies, and other employee and labor relation subjects.

The County is presently in negotiations with the Employees' Association, all three (3) AFSCME unions (CCOM, DTD and WES) and the Federation of Parole and Probation Officers (FOPPO) as a result of the wage reopener language in their contracts related to July 1, 2023 cost of living increases. Successor contract negotiations with the Peace Officers Association (POA) will also begin in May 2023 for their contract ending on June 30, 2023. We will also continue to bargain with the various unions the necessary changes to policy and contract language related to the County's to the Equal Pay Audit. Additionally, we will continue bargaining with the various unions the impacts of the implementation of Oregon Paid Leave, which is scheduled to take effect in September 2023.

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------------|---|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result (NEW) | 90% of corrective actions involving written reprimands, suspensions, demotions and employee terminations will have been vetted with E&LR before imposition. | 100% ¹ | 100% ¹ | 90% | 100% | 90% |
| Result (NEW) | 90% of managers/supervisors/will have E&LR training biannually. | 0% ² | 0% ² | 90% | 73% | 90% |
| Output | Number of collective bargaining agreements and/or other labor agreements negotiated to resolution. | 16 | 11 | 5 ³ | 13 | 5 ³ |
| Output (NEW) | Number of managers and supervisors completing employee/labor relations training courses. | 0 ⁴ | 68 ⁴ | 171 | 65 | 171 |
| Output (NEW) | Number of corrective actions involving written reprimand and above vetted with E&LR before imposing. | 9 | 26 | 20 | 24 | 20 |
| Result | 80% of grievances resolved prior to arbitration | Discontinue | n/a | | n/a | |
| Output | Number of disciplinary actions involving economic loss | Discontinue | n/a | | n/a | |
| Output | Number of implemented performance improvement plans, work plans and/or other similar performance management related tools | n/a | n/a | | n/a | |

Performance Measures Narrative:

¹ We have made solid progress in our new goal to engage in collaboration and consultation with County managers and supervisors during the progressive discipline process.

² The COVID pandemic-related remote work schedule within the County contributed to the results for the E&LR training related measures during this fiscal year.

³ The pandemic was also a considerable factor in the large number of labor agreements negotiated during this fiscal year.

⁴ In partnership with Learning and Development, E&LR has been successful in rolling training back out to County leaders in a virtual setting. E&LR has reworked curriculum for virtual delivery and has provided more training in both a virtual and in person setting as of 2022.

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation

Clackamas County has eight (8) separate collective bargaining agreements with six (6) separate unions. The County is obligated to negotiate collective bargaining agreements and other mandatory subjects of bargaining with the recognized unions in accordance with the Oregon Public Employee Collective Bargaining Act, ORS 243.650 - 243.806.



1602-Employee & Labor Relations Management

160202-Employee & Labor Relations
 BCC Priority Alignment: Accountable Government
 Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | - | - | 10,000 | 10,000 | 40,000 | 30,000 | 300% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | 590,625 | 590,209 | 590,209 | 566,208 | (24,001) | -4% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | 226,333 | 221,512 | 216,544 | 214,764 | (6,748) | -3% |
| Operating Revenue | - | 816,958 | 811,721 | 806,753 | 780,972 | (30,749) | -4% |
| Total Revenue | - | 816,958 | 821,721 | 816,753 | 820,972 | (749) | 0% |
| Personnel Services | - | 551,840 | 636,785 | 633,785 | 678,135 | 41,350 | 6% |
| Materials and Services | - | 124,445 | 184,935 | 142,968 | 142,837 | (42,098) | -23% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | - | 676,285 | 821,720 | 776,753 | 820,972 | (748) | 0% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | - | - | - | - | - |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | - | 676,285 | 821,720 | 776,753 | 820,972 | (748) | 0% |
| Revenues Less Expenses | - | 140,673 | - | 40,000 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Workforce Design

Classification and Compensation

Purpose Statement

The purpose of the Classification and Compensation program is to provide pay plan and job classification administration and organizational structure consultation services to County Departments so they can structure their organizations in a way that attracts, retains and equitably compensates employees to achieve their operational and strategic results.

Performance Narrative Statement

Major Initiatives:

The Classification & Compensation unit has two major initiatives in addition to the review and allocation of budgeted positions, strategic organizational design, and maintenance of the County's classification and compensation plans.

Pay Equity

In response to the Oregon Equal Pay Act, Classification & Compensation has implemented substantial changes to ensure equitable compensation practices. Among these changes is the salary placement assessment process. Prior to any conditional employment offer being made, Classification & Compensation staff conduct a salary placement assessment, in coordination with Recruitment & Selection and the hiring manager, to determine an equitable pay rate. A salary placement assessment is required for all regular, limited-term, temporary, and seasonal status placements to ensure equity, consistency, and compliance with the Oregon Equal Pay Act.

Classification & Compensation is also the process of revising pay practices and policies to eliminate the potential for pay equity issues moving forward. This process includes working with an outside chief negotiator to revise collective bargaining agreement language related to compensation practices.

Structured Classification Reviews

Classification & Compensation continues to make progress on this initiative, which seeks to ensure that all county classifications are reviewed for alignment with business needs and market compatibility at least every five years. Ensuring our classification specifications are up to date, that we are paying competitive wages and that employees are classified appropriately go hand-in-hand with the County's Equal Pay Analysis.

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 3/31/2023 | FY 23-24 Target |
|--------------|--|--------------------|---------------------|--------------------|--|--------------------|
| Result | By 2025, 100% of County classifications will have been reviewed for alignment with County business needs and market comparability within the past five years, and year over year thereafter. | 31% | 20% | 35% | 26% | 35% |
| Result (NEW) | By 2025, County Departments will have access to tools and data necessary to support hiring decisions. ¹ | 20% | 50% | 75% | 75% | 75% |
| Result (NEW) | By 2025, (full) implementation of Equal Pay Analysis recommendations under the direction of the Board of County Commissioners and the County Administrator. | n/a | 25% | 50% | 65% | 50% |
| Output | Number of position allocations, recommendations and determinations provided. | 321 | 362 | 250 | 241 | 250 |
| Output | Number of market studies conducted (individual classifications and job families). | 35 | 80 | 100 | 61 | 100 |
| Output (NEW) | Number of new or revised classification specifications. | 41 | 17 | 24 | 33 | 24 |
| Output (NEW) | Number of Equal Pay Analysis recommendations. ² | 265 | 827 | 700 | 645 | 700 |

Performance Measures Narrative:

New Classification and Compensation measures established/revised effective July 1, 2020.

¹ Current terminology should replace "tools" with "information".

Current terminology should replace "Equal Pay Analysis Recommendations" with "Salary Placement Approvals".

2

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160302-Classification & Compensation
 BCC Priority Alignment: Accountable Government
 Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | - | - | - | - | 60,000 | 60,000 | - |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | 661,394 | 857,801 | 857,801 | 735,652 | (122,149) | -14% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | 282,808 | 221,512 | 220,145 | 214,764 | (6,748) | -3% |
| Operating Revenue | - | 944,202 | 1,079,313 | 1,077,946 | 950,416 | (128,897) | -12% |
| Total Revenue | - | 944,202 | 1,079,313 | 1,077,946 | 1,010,416 | (68,897) | -6% |
| Personnel Services | - | 746,558 | 915,877 | 915,877 | 899,078 | (16,799) | -2% |
| Materials and Services | - | 177,914 | 163,436 | 102,069 | 111,338 | (52,098) | -32% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | - | 924,472 | 1,079,313 | 1,017,946 | 1,010,416 | (68,897) | -6% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | - | - | - | - | - |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | - | 924,472 | 1,079,313 | 1,017,946 | 1,010,416 | (68,897) | -6% |
| Revenues Less Expenses | - | 19,730 | - | 60,000 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Workforce Design

Recruitment and Selection

Purpose Statement

The purpose of the Recruitment and Selection Program is to provide consultation, outreach, evaluation and selection services to County Departments so they can hire and retain the qualified, diverse workforce they need to achieve their strategic results.

Performance Narrative Statement

Major Initiatives:

The Recruitment and Selection Division has two major initiatives in addition to providing support to departments to attract a qualified and diverse workforce.

Recruitment Backlog

In response to the recruitment backlog, the County has as a result of the pandemic, labor shortages, retirements, and workforce changes around the U.S., recruitment and selection has hired three (3) two (2) year Limited Terms. These limited terms are provided by the County Administrator and H3S leadership to assist with managing the recruitment backlog. With these additional resources, the recruitment team is focusing on reducing the recruitment backlog, which will help departments fill positions necessary to carry out their objectives. With the support of additional staff, the recruitment and selection team is making progress to reduce the recruitment backlog.

Improvements

Recruitment and Selection continues to look for ways to improve the recruitment process for applicants, hiring managers, and recruiters. A number of new improvements have been implemented such as reduction of the number of standard questions in applications, implementation of COVID OHA language in job postings, intranet page creation and buildout, implement standard diversity statement on all job postings, create and add telework language to job postings, implement JobElephant to assist with posting jobs on external job boards, and creating hiring manager documentation to assist with the recruitment process, ability to generate conditional job offers in PeopleSoft, and implementation of resume parsing tool into PeopleSoft.

Partnership

Recruitment and Selection continues to partner with the Office of Equity and Inclusion, departments, and other divisions within HR to support the County's recruitment needs. Recruitment and Selection will focus on developing a number of resources and learning opportunities focused around recruitment in partnership with others to help strengthen the recruitment process at Clackamas County. Recruitment and Selection continues to represent the County at career and events and looks forward to partnering with local community events to showcase all the wonderful opportunities the County has to offer.

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------|---|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result | 70% of open positions are filled within 90 days from the date of requisition ¹ | 49% | 52% | 70% | 43% | 70% |
| Output | Number of hires per year | 267 | 461 | 320 | 343 | 320 |
| Output | Number of job postings (recruitments) per year | 201 | 361 | 260 | 345 | 260 |
| Output | Number of recruitment outreach events per year ² | 18 | 12 | 24 | 22 | 24 |

Performance Measures Narrative:

¹ We continue to work toward our goal of reducing the recruitment backlog and improving recruitment related business processes. We suspect that with the addition of three (3) limited term employees on the recruitment and selection team, we will be able to hire and close more recruitments than previously. It is also anticipated that with the hire of three limited term employees, we will be able to open and close more recruitments than before. While there is a sense of "returning to normal", recruitment continues to be impacted by the pandemic and labor changes throughout the area. As mentioned previously, the "70% of open positions are filled within 90 days from the date of requisition" is no longer a realistic measure as there are many factors outside of the county that can impact and has impacted this metric.

² The Recruitment and Selection team continues to hire and work to open job postings to attract a qualified diverse workforce. While we are still seeing the aftermath of the pandemic, job fairs and events are starting to return to on-site. However, participation has changed for some events. The recruitment and selection team continues to look for meaningful opportunities to attend events to showcase and educate individuals about career opportunities at Clackamas County.

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet
If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160303-Recruitment & Selection
 BCC Priority Alignment: Accountable Government
 Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | - | - | 5,000 | 5,000 | - | (5,000) | -100% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | 706,076 | 917,449 | 917,449 | 1,068,733 | 151,284 | 16% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | - | 327,916 | 327,916 | 327,878 | (38) | 0% |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | 217,500 | 358,144 | 304,597 | 214,764 | (143,380) | -40% |
| Operating Revenue | - | 923,576 | 1,603,509 | 1,549,962 | 1,611,375 | 7,866 | 0% |
| Total Revenue | - | 923,576 | 1,608,509 | 1,554,962 | 1,611,375 | 2,866 | 0% |
| Personnel Services | - | 841,932 | 1,416,692 | 1,416,692 | 1,513,036 | 96,344 | 7% |
| Materials and Services | - | 110,345 | 191,816 | 138,270 | 98,339 | (93,477) | -49% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | - | 952,277 | 1,608,508 | 1,554,962 | 1,611,375 | 2,867 | 0% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | - | - | - | - | - |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | - | 952,277 | 1,608,508 | 1,554,962 | 1,611,375 | 2,867 | 0% |
| Revenues Less Expenses | - | (28,701) | - | - | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Workforce Design

Workforce Development and Planning

Purpose Statement

The purpose of the Workforce Planning and Development program is to provide workforce planning, support for supervisors, and learning and development services to the County and County Departments so they can anticipate and respond to the County's current and future workforce needs.

Performance Narrative Statement

Major Initiatives:

The Workforce Planning and Development (WPD) program supports countywide learning and development, change initiatives, leadership development and provides custom workforce planning services. The team, comprised of 2.8 FTE, focuses internal resources on custom efforts and utilizes vendor support to deliver services where time and resources are limited and outside expertise is beneficial. Much of the WPD budget dollars go towards learning events and training content.

- Learning and Development: In 22/23, we expanded our countywide learning offerings, including more in person offerings and more virtual platforms. We added classroom registration to our Learning Management System (Prositons), making it easier for County employees to register for classes and creating administration efficiencies. We intend to use this platform to maximize new employee and new supervisor onboarding in 23/24. Learning offerings have included such topics as conflict management, facilitation skills, mindful communications, organization skills, building trust and change management and mental health and wellness.
- Manager Communications and Development: Supervisors continue to be our biggest focus. We rolled out Leadership Academy cohort #8 in 22/23, our most diverse and engaged cohort in twelve years of running this program. Projects will be focused on influencing a culture at our organization that supports and cares about employees. We continue to support managers through monthly manager meetings, focused on enhancing communications and transparency on important topics. We created a structure for new supervisor development. It encompasses a Leadership Bootcamp through our Smart Pass 2.0 virtual platform, followed by six monthly HR-facilitated peer learning sessions. We also created a supervisor policy guide, including summaries of key policies for supervisors and narrated presentations which will be posted on our learning management system. And, lastly, we finalized core supervisory expectations and plan to roll these out countywide in 23/24.
- Employee Engagement: Per direction from the County Administrator, we delayed the rollout of the next engagement survey until Spring of 24. In the meantime, we hosted and facilitated two leadership summits which resulted in the creation of employee engagement change champions. This group will focus on helping to create and sustain an engaged workforce and support our next survey implementation.
- Performance Feedback: We have lost momentum the past few years in performance summary completions. Prior to putting this framework in place in 2018, less than 40% of employees received reviews. We saw an upward movement in FY 19/20 and since then, continue to see a downward trend. We attribute this trend to lack of accountability and challenges with the system and ease of the process. We have made some changes in 22/23. After gathering feedback through focus groups, we finalized one performance summary. In addition, we are partnering with TS to create an automated system in 23/24.
- Workforce Planning: Meeting departments where they are at with Workforce Planning will continue to be a focus in FY 23/24. In addition, as we look at turnover trends and employee engagement data, data analytics will help us prepare for the future. Succession planning is going to be critical in preparing for the future.
- Continue to partner with Equity and Inclusion Office in learning offerings and addressing organization challenges of retention and engagement.

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actual | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------------|--|--------------------|--------------------|--------------------|---------------------------------------|--------------------|
| Result (NEW) | 50% of County departments will have workforce planning strategies looking ahead 2-5 years that are aligned with their strategic business plan in consultation with the Workforce Planning and Development program. | 25% | 25% | 50% | 25% | 50% |
| Result | 90% of Learning & Development participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time. | 92% ¹ | 91% ¹ | 90% | 94% ¹ | 90% |
| Result | 90% of employees will have a documented summary of performance at least annually. | 61% | 60% | 90% | 70% | 90% |
| Output (NEW) | Number of Workforce planning consultations. | 17 | 32 | 50 | 35 | 50 |
| Output | Number of County employees engaged in learning events. | 571 | 9862 | 2000 | 1215 | 2000 |
| Output (NEW) | Number of employees with a documented summary of performance each year. | 1070 | 828 | 1800 | 1120 | 1800 |
| Output | Number of workforce plans developed | n/a | n/a | | n/a | |
| Result | By 2021 90% of County departments will have workforce planning elements integrated into their strategic business plan | Discontinue | n/a | | n/a | |
| Output | Number of employees engaging with the Leadership Academy | Discontinue | n/a | | n/a | |
| Output | Number of County employees registered for formal learning events | Discontinue | n/a | | n/a | |

Performance Measures Narrative:

The 10% increase since FY 21/22 is due to our collaboration with the Sheriff's Office and the new system they put in place that aligns with our framework, Clarify, Converse, and Capture. The Sheriff's Office went from 33% to 90% timely documented performance summaries in one year. We are looking at a countywide sytem for FY 23/24 to help us get closer to our 90% target countywide.

We'll see volatility in number of employees registered for events depending on required annual trainings.

1

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160304-Workforce Planning & Development

BCC Priority Alignment: Accountable Government

Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | - | - | 27,966 | 27,966 | - | (27,966) | -100% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | 466,826 | 401,141 | 401,141 | 376,254 | (24,887) | -6% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | 174,096 | 221,512 | 171,547 | 214,764 | (6,748) | -3% |
| Operating Revenue | - | 640,922 | 622,653 | 572,688 | 591,018 | (31,635) | -5% |
| Total Revenue | - | 640,922 | 650,619 | 600,654 | 591,018 | (59,601) | -9% |
| Personnel Services | - | 389,419 | 420,217 | 420,217 | 444,181 | 23,964 | 6% |
| Materials and Services | - | 158,343 | 230,401 | 180,437 | 146,837 | (83,564) | -36% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | - | 547,762 | 650,618 | 600,654 | 591,018 | (59,600) | -9% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | - | - | - | - | - |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | - | 547,762 | 650,618 | 600,654 | 591,018 | (59,600) | -9% |
| Revenues Less Expenses | - | 93,160 | - | - | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Benefits and Wellness

Benefits Administration

Purpose Statement

The purpose of the Benefits and Wellness line of business is to provide comprehensive benefits, disability management, planning, education and consultation services to County departments, and employees so they can create a workplace culture committed to practices that sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

Major Initiatives:

In addition to continuing to offer a very competitive employee benefits package in support of our mission, the Benefits and Wellness division has laid the groundwork to transition to modern approaches to employee benefit processing, internal controls, and improved benefits technology solutions.

In 2022 we completed Phase 3 of our Benefits Service Delivery Transformation in order to prepare to implement our service delivery strategy. A primary objective of this phase was to identify and onboard a benefits administration third-party vendor in order to move the County from transactional benefits administration to strategically managed benefits delivery. The third-party vendor has been identified and this project will continue into FY 23-24 to help the county realize its strategy and achieve success in the following areas:

- Enhanced customer experience
- Implement plan sponsor best practices
- Introduce comprehensive compliance, audit, and controls
- Minimize manual processing and reconciliation
- Access to accurate and timely data with dashboard reporting
- Instill consistent vendor management practices
- Transform benefits team service delivery model

We also began evaluating and preparing for Oregon Paid Family Medical Leave (PFML), a recent state-mandated leave that applies to the county and its workforce. The new law provides a broad benefit to workers across the state, but also significantly increases complexity and risk to program administration.

The County considered three options to ensure compliance with this new law: adopt the state program, self-administer and fund an equivalent plan, or offer a fully insured equivalent plan and outsource its administration. Ultimately, the County determined to move forward with utilizing a fully insured equivalent plan and outsource its administration based on a number of factors, including the current state of its Leave Administration program, which lacks modern approaches to program administration in its processes and technology. These lead to diminished customer experience, errors in reporting and compliance, and unnecessary risk exposure for the County.

By leveraging our current employee disability benefits carrier and third-party administrator The Standard for all leave and disability administration, the County is able to ensure compliance with Oregon PFML requirements, as well as improve customer experience, provide effective coordination of benefits, gain access to accurate and timely data and reporting, and introduce comprehensive compliance, audits and controls for all leave and disability benefit administration. This will also allow for a transformation of the in-house leave administration team with renewed focus on supporting organization-wide productivity and employee engagement efforts.

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 22-23 Target |
|--------------|---|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result (NEW) | 80% of employees return to work within 90 days of initial non-occupational short-term disability. | 90% | n/a ¹ | 90% | 90% ³ | 90% |
| Result (NEW) | 90% of supervisor and manager survey responses indicate "agree" or "strongly agree" they have timely and accurate information about their employees' protected leaves and disability. | 61% | 70% | 90% | N/A ² | 90% |
| Result (NEW) | Annual alignment of wellness programs with workforce need. | n/a ¹ | n/a ¹ | 20% | n/a ¹ | 20% |
| Output (NEW) | Number of medical leave requests. | n/a ¹ | 368 | 450 | 249 | 450 |
| Output (NEW) | Number of Wellness Program class participants. | n/a ¹ | n/a ¹ | 150 | n/a ¹ | 150 |
| Output (NEW) | Number of enrollment changes. | n/a ¹ | 7890 | 3690 | 2970 | 3690 |
| Result | 90% of Wellness class surveys indicate "agree" or "strongly agree" that the class contributes to well-being | Discontinue | n/a | | n/a | |
| Result | 90% of Expected/Open Leave Cases in PeopleSoft HR are accurate | Discontinue | n/a | | n/a | |
| Result | 80% of employees return to work within 180 days of initial non-occupational disability claim | Discontinue | n/a | | n/a | |

Performance Measures Narrative:

¹ This data was not available due to staff changes.

² This data was not collected by the annual survey from County Administration in Dec 2022.

³ Return to Work data isn't available until July so this data is an estimate.

By leveraging third-party administrators for benefits and leave administration, the Benefits & Wellness division will have access to relevant, accurate and timely program data and dashboards, which are not currently available. This will allow for development of expanded Performance Clackamas results and outputs to drive better program performance and accountability.

Program includes:

Mandated Services ☐ Y

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation Mandated Services: Clackamas County is considered an applicable large employer under the Affordable Care Act. This means that the County is required to offer eligible employees medical coverage that meets affordability and minimum value standards.



160401-Benefits Administration
 BCC Priority Alignment: Accountable Government
 Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 2,883,320 | 2,896,090 | 2,036,817 | 2,036,817 | 3,304,078 | 1,267,261 | 62% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | 10,592 | 6,210 | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 2,046,033 | 1,746,745 | 1,655,078 | 1,907,534 | 1,912,764 | 257,686 | 16% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 207,306 | 50,369 | 153,200 | 153,200 | 150,101 | (3,099) | -2% |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 2,263,930 | 1,803,324 | 1,808,278 | 2,060,734 | 2,062,865 | 254,587 | 14% |
| Total Revenue | 5,147,250 | 4,699,415 | 3,845,095 | 4,097,551 | 5,366,943 | 1,521,848 | 40% |
| Personnel Services | 1,529,903 | 1,285,538 | 2,085,159 | 2,077,086 | 2,331,367 | 246,208 | 12% |
| Materials and Services | 721,257 | 858,316 | 1,286,082 | 1,216,387 | 2,710,751 | 1,424,669 | 111% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 2,251,160 | 2,143,854 | 3,371,241 | 3,293,473 | 5,042,118 | 1,670,877 | 50% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | 473,854 | - | 324,825 | (149,029) | -31% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 2,251,160 | 2,143,854 | 3,845,095 | 3,293,473 | 5,366,943 | 1,521,848 | 40% |
| Revenues Less Expenses | 2,896,090 | 2,555,561 | - | 804,078 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Benefits and Wellness

Medical Insurance

Purpose Statement

The purpose of the Benefits and Wellness line of business is to provide comprehensive benefits, disability management, planning, education and consultation services to County departments, and employees so they can create a workplace culture committed to practices that sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

SERVICES:

- Health insurance, employee assistance, disability and retirement benefits plans
- Family medical leave requests, resources, updates and inquiry responses
- Disability accommodations assessments, consultations and recommendations
- Wellness events
- New employee benefit orientation sessions

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------------|-------------------------------|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Output (NEW) | Number of enrollment changes. | n/a | 7890 | 3690 | 2970 | 3690 |

Performance Measures Narrative:

None

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation Mandated Services: Clackamas County is considered an applicable large employer under the Affordable Care Act. This means that the County is required to offer eligible employees medical coverage that meets affordability and minimum value standards.



| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 11,940,003 | 16,418,677 | 20,670,114 | 18,596,188 | 17,815,326 | (2,854,788) | -14% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | - | - | - | - | - | - |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 29,457,396 | 28,265,928 | 28,279,787 | 25,688,544 | 26,972,971 | (1,306,816) | -5% |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 29,457,396 | 28,265,928 | 28,279,787 | 25,688,544 | 26,972,971 | (1,306,816) | -5% |
| Total Revenue | 41,397,399 | 44,684,605 | 48,949,901 | 44,284,732 | 44,788,297 | (4,161,604) | -9% |
| Personnel Services | - | - | - | - | - | - | - |
| Materials and Services | 24,978,722 | 26,467,661 | 28,865,632 | 23,969,406 | 30,167,877 | 1,302,245 | 5% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 24,978,722 | 26,467,661 | 28,865,632 | 23,969,406 | 30,167,877 | 1,302,245 | 5% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | 2,700,000 | - | 2,997,000 | 297,000 | 11% |
| Contingency | - | - | 17,384,269 | - | 11,623,420 | (5,760,849) | -33% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 24,978,722 | 26,467,661 | 48,949,901 | 23,969,406 | 44,788,297 | (4,161,604) | -9% |
| Revenues Less Expenses | 16,418,677 | 18,216,944 | - | 20,315,326 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Benefits and Wellness

Dental Insurance

Purpose Statement

The purpose of the Benefits and Wellness line of business is to provide comprehensive benefits, disability management, planning, education and consultation services to County departments, and employees so they can create a workplace culture committed to practices that sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

SERVICES:

- Health insurance, employee assistance, disability and retirement benefits plans
- Family medical leave requests, resources, updates and inquiry responses
- Disability accommodations assessments, consultations and recommendations
- Wellness events
- New employee benefit orientation sessions

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--|--|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| | | | | | | |

Performance Measures Narrative: N/A

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160403-Dental Insurance

BCC Priority Alignment: Accountable Government

Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 1,488,578 | 1,800,854 | 2,123,364 | 2,123,364 | 2,579,788 | 456,424 | 21% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | - | - | - | - | - | - |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 2,422,627 | 2,311,624 | 2,214,223 | 2,151,212 | 2,151,212 | (63,011) | -3% |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 2,422,627 | 2,311,624 | 2,214,223 | 2,151,212 | 2,151,212 | (63,011) | -3% |
| Total Revenue | 3,911,205 | 4,112,478 | 4,337,587 | 4,274,576 | 4,731,000 | 393,413 | 9% |
| Personnel Services | - | (2,543) | - | - | - | - | - |
| Materials and Services | 2,110,351 | 2,142,095 | 2,094,868 | 1,694,788 | 1,894,788 | (200,080) | -10% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 2,110,351 | 2,139,552 | 2,094,868 | 1,694,788 | 1,894,788 | (200,080) | -10% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | 245,300 | - | 248,000 | 2,700 | 1% |
| Contingency | - | - | 1,997,419 | - | 2,588,212 | 590,793 | 30% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 2,110,351 | 2,139,552 | 4,337,587 | 1,694,788 | 4,731,000 | 393,413 | 9% |
| Revenues Less Expenses | 1,800,854 | 1,972,926 | - | 2,579,788 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Benefits and Wellness

Disability Insurance

Purpose Statement

The purpose of the Benefits and Wellness line of business is to provide comprehensive benefits, disability management, planning, education and consultation services to County departments, and employees so they can create a workplace culture committed to practices that sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

SERVICES:

- Health insurance, employee assistance, disability and retirement benefits plans
- Family medical leave requests, resources, updates and inquiry responses
- Disability accommodations assessments, consultations and recommendations
- Wellness events
- New employee benefit orientation sessions

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------------|--|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result (NEW) | 80% of employees return to work within 90 days of initial non-occupational short-term disability. | 90% | 95% | 90% | 90% ² | |
| Result (NEW) | 90% of supervisor and manager survey responses indicate "agree or "strongly agree" they have timely and accurate information about their employees' protected leaves and disability. | 61% | 70% | 90% | N/A ¹ | 90% |
| Output (NEW) | Number of medical leave requests. | n/a | 368 | 450 | 249 | 450 |

Performance Measures Narrative:

¹ This data was not collected by the annual survey from County Administration in Dec 2022.

² Return to Work data isn't available until July so this data is an estimate.

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160404-Disability Insurance

BCC Priority Alignment: Accountable Government

Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 833,180 | 992,564 | 1,172,381 | 1,172,381 | 1,190,546 | 18,165 | 2% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | - | - | - | - | - | - |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 312,487 | 276,081 | 285,142 | 285,142 | 285,142 | - | 0% |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 312,487 | 276,081 | 285,142 | 285,142 | 285,142 | - | 0% |
| Total Revenue | 1,145,668 | 1,268,645 | 1,457,523 | 1,457,523 | 1,475,688 | 18,165 | 1% |
| Personnel Services | - | - | - | - | - | - | - |
| Materials and Services | 153,104 | 165,839 | 305,325 | 266,977 | 466,977 | 161,652 | 53% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 153,104 | 165,839 | 305,325 | 266,977 | 466,977 | 161,652 | 53% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | 58,252 | - | 38,239 | (20,013) | -34% |
| Contingency | - | - | 1,093,946 | - | 970,472 | (123,474) | -11% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 153,104 | 165,839 | 1,457,523 | 266,977 | 1,475,688 | 18,165 | 1% |
| Revenues Less Expenses | 992,564 | 1,102,805 | - | 1,190,546 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Benefits and Wellness

Employee Assistance Program/Wellness

Purpose Statement

The purpose of the Benefits and Wellness line of business is to provide comprehensive benefits, disability management, planning, education and consultation services to County departments, and employees so they can create a workplace culture committed to practices that sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

SERVICES:

- Health insurance, employee assistance, disability and retirement benefits plans
- Family medical leave requests, resources, updates and inquiry responses
- Disability accommodations assessments, consultations and recommendations
- Wellness events
- New employee benefit orientation sessions

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------------|--|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result (NEW) | Annual alignment of wellness programs with workforce need. | n/a ¹ | n/a ¹ | 20% | n/a ¹ | 20% |
| Output (NEW) | Number of Wellness Program class participants. | n/a ¹ | n/a ¹ | 150 | n/a ¹ | 150 |

Performance Measures Narrative:

¹ This data was not available due to staff changes.

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 627,630 | 682,466 | 662,739 | 662,739 | 582,876 | (79,863) | -12% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 88,454 | 79,241 | 77,412 | 76,244 | 76,244 | (1,168) | -2% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 85,755 | 83,061 | 80,433 | 79,432 | 79,432 | (1,001) | -1% |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 174,209 | 162,302 | 157,845 | 155,676 | 155,676 | (2,169) | -1% |
| Total Revenue | 801,839 | 844,768 | 820,584 | 818,415 | 738,552 | (82,032) | -10% |
| Personnel Services | - | - | - | - | - | - | - |
| Materials and Services | 119,373 | 97,916 | 177,572 | 235,539 | 219,594 | 42,022 | 24% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 119,373 | 97,916 | 177,572 | 235,539 | 219,594 | 42,022 | 24% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | 643,012 | - | 518,958 | (124,054) | -19% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 119,373 | 97,916 | 820,584 | 235,539 | 738,552 | (82,032) | -10% |
| Revenues Less Expenses | 682,466 | 746,852 | - | 582,876 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Benefits and Wellness

Deferred Compensation

Purpose Statement

The purpose of the Benefits and Wellness line of business is to provide comprehensive benefits, disability management, planning, education and consultation services to County departments, and employees so they can create a workplace culture committed to practices that sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

SERVICES:

- Health insurance, employee assistance, disability and retirement benefits plans
- Family medical leave requests, resources, updates and inquiry responses
- Disability accommodations assessments, consultations and recommendations
- Wellness events
- New employee benefit orientation sessions

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--|--|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| | | | | | | |

Performance Measures Narrative: n/a

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160406-Deferred Compensation
 BCC Priority Alignment: Accountable Government
 Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 2,082 | 2,082 | 5,682 | 5,682 | 3,882 | (1,800) | -32% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | - | - | - | - | - | - | - |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 100 | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 100 | - | - | - | - | - | - |
| Total Revenue | 2,182 | 2,082 | 5,682 | 5,682 | 3,882 | (1,800) | -32% |
| Personnel Services | - | - | - | - | - | - | - |
| Materials and Services | 100 | - | 4,700 | 1,800 | 1,800 | (2,900) | -62% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 100 | - | 4,700 | 1,800 | 1,800 | (2,900) | -62% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | 982 | - | 2,082 | 1,100 | 112% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 100 | - | 5,682 | 1,800 | 3,882 | (1,800) | -32% |
| Revenues Less Expenses | 2,082 | 2,082 | - | 3,882 | - | | |

Notes: This program is part of the comprehensive employee benefits plan for Clackamas County employees and includes a range of services.



Risk & Safety Management

Risk Administration

Purpose Statement

The purpose of the Risk and Safety Management line of business is to provide comprehensive loss prevention and control, risk management, planning education and consultation services to County departments and employees, so they can create a workplace culture committed to practices that reduce risk, sustain a healthy and productive workforce, and preserve financial resources.

Performance Narrative Statement

Major Initiatives/Goals:

Continue optimization of the RMIS system for liability and workers compensation claims handling:

Efficiency improvements continue to emerge, thereby reducing administrative burden and allowing more time toward analysis and management of County risks and claims. Additionally, other areas of HR continue to explore the use of the system for their own process optimization.

Update County Risk allocation model for FY 24/25 year:

Update existing allocation model, assuring that each department is paying their equitable share of risk management expenses.

Goals: Continue to look for best insurance or risk transfer options; Keep County Risk allocation increases to a minimum; Protect County employees and assets

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|---------|--|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result | Clackamas County will maintain a workers' compensation rating below the state's industry average. ¹ | 71% | 74% | 100% | 77% | 100% |
| Results | Maintain Clackamas County's ratio of actual liability claims losses paid to the actuarial estimate at 1 or below. ¹ | 0.60 | 0.60 | 1 | 0.8 | 1 |
| Result | By 2025, all classification specifications will contain risk management responsibilities. ¹ | 0% | 0% | 100% | 100% | 100% |
| Result | By 2025, departments will have access to real time risk management data (examples: injury trends, claim expenses). | 100% | 100% | 100% | 100% | 100% |
| Output | Number of ergonomic assessments provided quarterly | 21 | 63 | 100 | 40 | 100 |
| Output | Number of liability claims. | 83 | 96 | 120 | 86 | 120 |
| Output | Number of workers' compensation claims processed quarterly | 32 | 120 | 120 | 73 | 30 |
| Output | Number of driving checks ¹ | 379 | 497 | 400 | 278 | 400 |
| Output | Number of unemployment claims. | 104 | 193 | 120 | 68 | 150 |

Performance Measures Narrative:

¹ This data is per Fiscal Year and collected annually in June.

The "Results" measures are intended to measure success of the overall program to industry metrics. Comparing the actual liability claims amount paid to what is "expected", based on a review by our third party actuary, gives a good sense of our loss control, mitigation and management efforts around our liability claims.

In a similar vein, the workers' compensation rating results measure is another way to compare us to our industry peers. This is a number used by insurance companies to gauge both past cost of injuries and future chances of risk. One (1) is general industry standard. Anything below that indicates above average in comparison.

The "Outputs" are broken down into five categories;

-Ergonomics, liability claims, workers' compensation claims, driving checks and unemployment claims processed.

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | - | 383,111 | 56,134 | 81,138 | - | (56,134) | -100% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | 18,792 | 9,112 | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 1,825,032 | 1,228,659 | 1,669,427 | 1,573,631 | 1,719,025 | 49,598 | 3% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 188,474 | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 2,032,298 | 1,237,771 | 1,669,427 | 1,573,631 | 1,719,025 | 49,598 | 3% |
| Total Revenue | 2,032,298 | 1,620,882 | 1,725,561 | 1,654,769 | 1,719,025 | (6,536) | 0% |
| Personnel Services | 1,402,639 | 1,306,602 | 1,410,925 | 1,409,925 | 1,496,142 | 85,217 | 6% |
| Materials and Services | 246,936 | 233,142 | 250,349 | 244,844 | 222,883 | (27,466) | -11% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 1,649,574 | 1,539,744 | 1,661,274 | 1,654,769 | 1,719,025 | 57,751 | 3% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | 64,287 | - | - | (64,287) | -100% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 1,649,574 | 1,539,744 | 1,725,561 | 1,654,769 | 1,719,025 | (6,536) | 0% |
| Revenues Less Expenses | 382,724 | 81,138 | - | - | - | | |

Notes:

The administration program for Risk & Safety that contains the salaries, fringe, software and allocation costs of the Risk Fund. Costs here have risen mostly in-step with economic inflation. FTE count has remained the same for at least 5 years.



Risk & Safety Management

Casualty/Liability

Purpose Statement

The purpose of the Casualty/Liability program is to provide funding, management and consultation to County departments in an effort to reduce costs and resolve matters of property damage and liability against the County.

Performance Narrative Statement

SERVICES:

- Casualty/Liability self-insured and liability claims funding
- Casualty/Liability claims management
- Liability (excess), cyber, public officials, volunteer and property insurance policies
- Contract risk reviews; Driver program management

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 22-23 Target |
|---------|--|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Output | Number of liability claims. | 83 | 96 | 120 | 86 | 120 |
| Results | Maintain Clackamas County's ratio of actual liability claims losses paid to the actuarial estimate at 1 or below. ¹ | 0.60 | 0.60 | 1 | 0.8 | 1 |

Performance Measures Narrative:

¹ This data is per Fiscal Year and collected annually in June.

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160502-Casualty/Liability

BCC Priority Alignment: Accountable Government

Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 10,610,071 | 10,053,303 | 10,045,203 | 9,772,288 | 9,001,994 | (1,043,209) | -10% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 1,888,229 | 2,087,482 | 2,132,335 | 1,611,411 | 2,034,769 | (97,566) | -5% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | 138,286 | 36,740 | 100,000 | 10,000 | 50,000 | (50,000) | -50% |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 2,026,515 | 2,124,222 | 2,232,335 | 1,621,411 | 2,084,769 | (147,566) | -7% |
| Total Revenue | 12,636,585 | 12,177,524 | 12,277,538 | 11,393,699 | 11,086,763 | (1,190,775) | -10% |
| Personnel Services | - | - | - | - | - | - | - |
| Materials and Services | 1,583,851 | 2,405,236 | 2,472,850 | 2,391,705 | 2,502,500 | 29,650 | 1% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 1,583,851 | 2,405,236 | 2,472,850 | 2,391,705 | 2,502,500 | 29,650 | 1% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | 1,000,000 | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | 6,701,000 | - | 2,669,000 | (4,032,000) | -60% |
| Contingency | - | - | 2,503,688 | - | 5,915,263 | 3,411,575 | 136% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 2,583,851 | 2,405,236 | 11,677,538 | 2,391,705 | 11,086,763 | (590,775) | -5% |
| Revenues Less Expenses | 10,052,734 | 9,772,288 | 600,000 | 9,001,994 | - | | |

Notes:

Liability claims costs have held mostly steady for many years. Several large claims were paid out this current fiscal year. In FY 19, Clackamas County spent \$853,578 on insurance premiums. In FY 23, Clackamas County spent \$1,315,541, an increase of 54%



Risk & Safety Management

Workers' Compensation

Purpose Statement

The purpose of the Workers' Compensation program is to provide funding, management and consultation to County departments in an effort to reduce costs and resolve matters involving employees, injured in the course and scope of employment at the County.

Performance Narrative Statement

SERVICES:

- Worker's Compensation self-insured claims funding
- Workers' Compensation claims management
- Excess Workers' Compensation policies
- State of Oregon self-insured Workers' Compensation compliance

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------|--|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Result | Clackamas County will maintain a workers' compensation rating below the state's industry average. ¹ | 71% | 74% | 100% | 77% | 100% |
| Output | Number of workers' compensation claims processed quarterly | 32 | 120 | 120 | 73 | 30 |

Performance Measures Narrative:

¹ This data is per Fiscal Year and collected annually in June

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160503-Workers' Compensation
 BCC Priority Alignment: Accountable Government
 Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 2,588,377 | 2,207,713 | 2,398,151 | 2,115,836 | 2,005,455 | (392,696) | -16% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 1,094,177 | 1,593,038 | 1,222,864 | 1,719,584 | 1,896,584 | 673,720 | 55% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 1,094,177 | 1,593,038 | 1,222,864 | 1,719,584 | 1,896,584 | 673,720 | 55% |
| Total Revenue | 3,682,554 | 3,800,751 | 3,621,015 | 3,835,420 | 3,902,039 | 281,024 | 8% |
| Personnel Services | - | 18,725 | - | - | - | - | - |
| Materials and Services | 1,473,886 | 1,666,190 | 1,890,500 | 1,829,965 | 1,861,000 | (29,500) | -2% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 1,473,886 | 1,684,915 | 1,890,500 | 1,829,965 | 1,861,000 | (29,500) | -2% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | 2,141,000 | - | 1,000,000 | (1,141,000) | -53% |
| Contingency | - | - | 189,515 | - | 1,041,039 | 851,524 | 449% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 1,473,886 | 1,684,915 | 4,221,015 | 1,829,965 | 3,902,039 | (318,976) | -8% |
| Revenues Less Expenses | 2,208,669 | 2,115,836 | (600,000) | 2,005,455 | - | | |

Notes:

The 6/30/22 WC actuarial report showed an actuarial increase of \$976,000 (46%) on a y-o-y basis. This is indicative of increasing claim severity, increasing costs of medical treatment, increasing litigation, increasing PTSD claims, among others.



Risk & Safety Management

Unemployment

Purpose Statement

The purpose of the Unemployment program is to assess unemployment claims, reimburse the State for paid amounts, and bill County departments for their share of unemployment costs.

Performance Narrative Statement

SERVICES:

- Unemployment claims processing
- Department level inter-fund billing of accrued unemployment costs

Key Performance Measures

| | | FY 20-21 Actual | FY 21-22 Actuals | FY 22-23 Target | FY 22-23 Actuals as of 03/31/23 | FY 23-24 Target |
|--------|--------------------------------|--------------------|---------------------|--------------------|---------------------------------------|--------------------|
| Output | Number of Unemployment Claims. | 104 | 193 | 120 | 68 | 150 |

Performance Measures Narrative:

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160504-Unemployment

BCC Priority Alignment: Accountable Government

Budget Summary

| | FY20-21 Actuals | FY21-22 Actuals | FY22-23 Amended Budget | FY22-23 Projected Year- End | FY23-24 Budget | Change from Prior Yr Budget | % Change from Prior Yr Budget |
|---|--------------------|--------------------|------------------------------|-----------------------------------|-------------------|--------------------------------|----------------------------------|
| Beginning Fund Balance | 170,837 | 169,150 | 165,350 | 165,741 | 161,941 | (3,409) | -2% |
| Taxes | - | - | - | - | - | - | - |
| Federal, State, Local, All Other Gifts & Donations | - | - | - | - | - | - | - |
| Charges, Fees, License, Permits, Fines, Assessments | 222,404 | 227,269 | 200,000 | 200,000 | 350,000 | 150,000 | 75% |
| Revenue from Bonds & Other Debts | - | - | - | - | - | - | - |
| All Other Revenue Resources | - | - | - | - | - | - | - |
| Other Interfund Transfers | - | - | - | - | - | - | - |
| General Fund Support | - | - | - | - | - | - | - |
| Operating Revenue | 222,404 | 227,269 | 200,000 | 200,000 | 350,000 | 150,000 | 75% |
| Total Revenue | 393,241 | 396,419 | 365,350 | 365,741 | 511,941 | 146,591 | 40% |
| Personnel Services | - | - | - | - | - | - | - |
| Materials and Services | 224,091 | 230,678 | 203,800 | 203,800 | 353,800 | 150,000 | 74% |
| Capital Outlay | - | - | - | - | - | - | - |
| Operating Expense | 224,091 | 230,678 | 203,800 | 203,800 | 353,800 | 150,000 | 74% |
| Debt Service | - | - | - | - | - | - | - |
| Special Payments | - | - | - | - | - | - | - |
| Transfers | - | - | - | - | - | - | - |
| Reserve for Future Expenditures | - | - | - | - | - | - | - |
| Contingency | - | - | 161,550 | - | 158,141 | (3,409) | -2% |
| Unappropriated Ending Fund Balance | - | - | - | - | - | - | - |
| Total Expense | 224,091 | 230,678 | 365,350 | 203,800 | 511,941 | 146,591 | 40% |
| Revenues Less Expenses | 169,150 | 165,741 | - | 161,941 | - | | |

Notes:

Unemployment costs continue to be managed and paid as needed. Departments are charged for all costs associated to their areas.