



EMPLOYEE BENEFITS



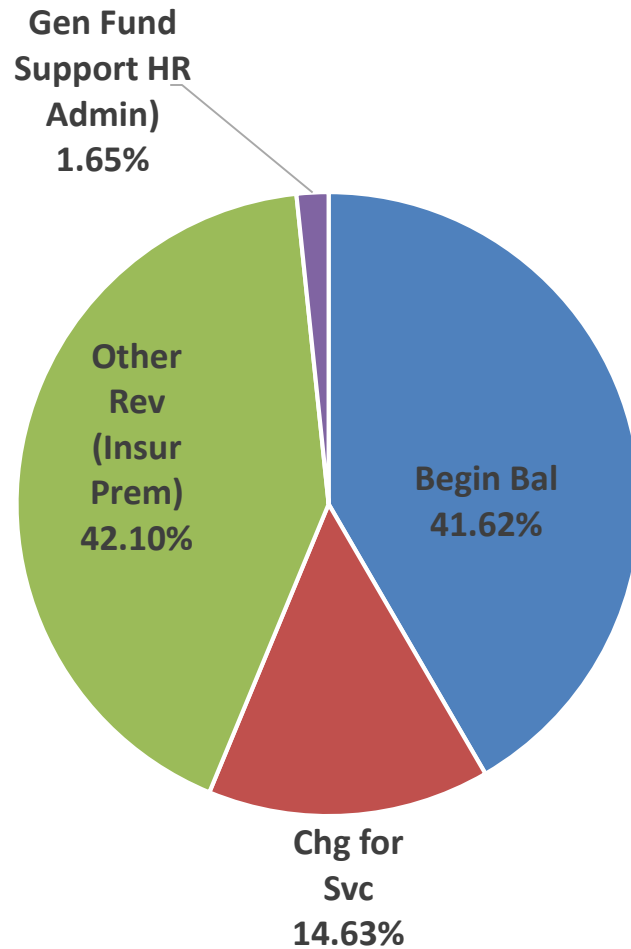
Human Resources

2020-2021 BUDGET PRESENTATION

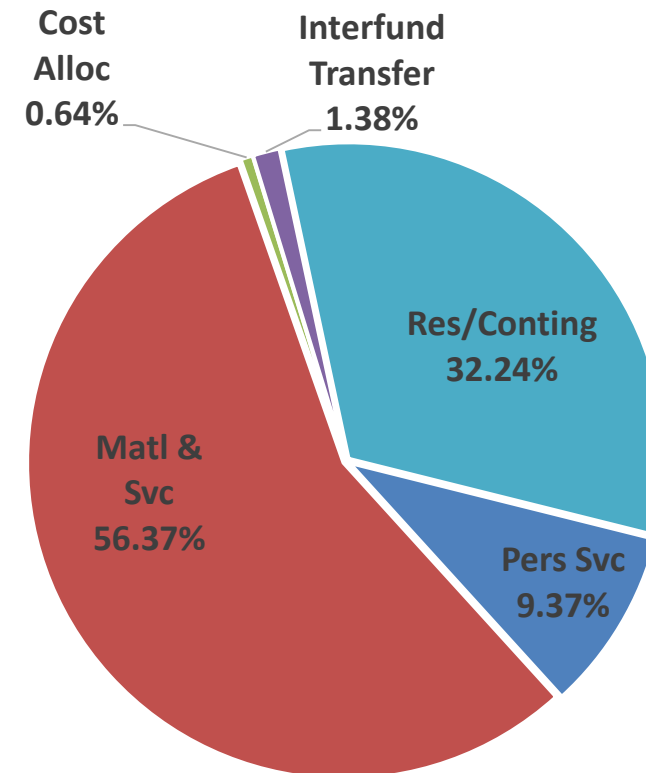
Human Resources

2020/21 Revenue and Expenses

Revenue



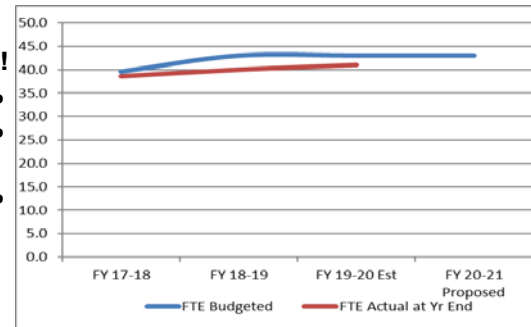
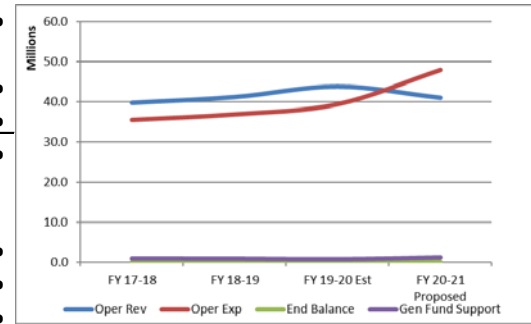
Expenditures



Human Resources

Summary of Revenue & Expenses

	FY 17-18	FY 18-19	FY 19-20 Adopted Budgeted	FY 19-20 Amended Budgeted	FY 19-20 Projected Year End V2	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	14,465,757	19,701,536	23,001,328	24,929,389	24,929,389	30,072,717	5,143,328	20.6%
Charges for Service	10,712,847	11,498,428	12,249,008	12,249,008	12,754,136	10,570,948	-1,678,060	-13.7%
Other Revenues (insurance Premiums)	29,036,057	29,682,966	29,605,810	29,605,810	31,039,020	30,426,320	820,510	2.8%
Operating Revenue	39,748,904	41,181,394	41,854,818	41,854,818	43,793,156	40,997,268	-857,550	-2.0%
% Change	NA	3.6%	5.3%	1.6%	4.6%	-3.8%		
Personnel Services	5,385,261	5,754,728	6,657,042	6,657,042	6,321,536	6,772,088	115,046	1.7%
Materials & Services	29,603,753	30,637,543	37,689,137	37,704,137	32,576,125	40,733,230	3,029,093	8.0%
Cost Allocation Charges	426,013	422,973	459,184	459,184	459,184	463,084	3,900	0.8%
Capital Outlay	0	293					0	0%
Operating Expenditure	35,415,027	36,815,537	44,805,363	44,820,363	39,356,845	47,968,402	3,148,039	7.0%
% Change	NA	4.0%	26.5%	21.7%	-12.2%	18.4%		
**FY21 Interfund Transfer from Risk Admin to General Fund								
Interfund Transfers **	0	0	0	0	0	1,000,000	1,000,000	#DIV/0!
Reserve for Future Expenditures	0	0	5,720,681	5,880,654	0	5,555,858	-324,796	-5.5%
Contingency	0	0	15,622,432	17,390,520	0	17,738,711	348,191	2.0%
Total Expenditure	35,415,027	36,815,537	66,148,476	68,091,537	39,356,845	72,262,971	4,171,434	6.1%
Ending Balance (if applicable) (includes Reserve & Contingency)								
General Fund Support (if applicable)	901,904	861,996	1,307,330	1,307,330	707,017	1,192,986	-114,344	-8.7%
Full Time Equiv Positions (FTE) Budgeted	39.6	43.0	43.0	43.0	43.0	43.0	0.0	0%
Full Time Equiv Positions (FTE) Filled at Yr E	38.6	40.0			41.0			
Full Time Equiv Positions (FTE) Vacant at Yr	1.0	3.0			2.0			





Human Resources

Department Budget Summary by Fund

Line of Business	FY 20/21	FY 20/21	FY 20/21	FY 20/21	FY 20/21	FY 20/21
Program	FTE	General Fund	Self -Insurance Fund	Risk Management Claims Fund	Total Proposed Budget	General Fund Subsidy Included in Proposed Budget**
Administration						
Director's Office/Administrative Services	4.00	906,120			906,120	217,904
Workforce Data Management	4.50	697,140			697,140	63,171
Employee and Labor Relations						
Employee and Labor Relations	2.50	673,462			673,462	236,211
Workforce Design						
Classification and Compensation	4.00	966,610			966,610	319,901
Recruitment and Selection	6.00	1,087,225			1,087,225	136,821
Workforce Development and Planning	2.00	609,891			609,891	218,978
Benefits and Wellness						
Benefits and Wellness	11.25		49,015,767		49,015,767	
Risk Administration						
Risk Management	8.75			18,306,755	18,306,755	
TOTAL	43.00	4,940,449	49,015,767	18,306,755	72,262,970	1,192,986
FY 19/20 Budget	43.00	5,054,793	44,921,791	18,114,953	68,091,537	1,307,330
\$ Increase (Decrease)	0.00	-114,344	4,093,976	191,802	4,171,433	-114,344
% Increase (Decrease)	0.00%	-2.26%	9.11%	1.06%	6.13%	-8.75%

Human Resources

2019 Major Accomplishments

Human Resources

- **Equal Pay Audit** – Surveyed all County employees regarding their individual jobs and classifications; next phase includes recommendations to modify County compensation structures, systems, policies and to individual compensation to eliminate any unlawful wage disparities.
- **ERP Strategic Planning** – Partnered with Finance, Technology Services and County Administration on the business analysis review for Finance; next steps are to develop a cost benefits analysis of the recommended paths forward.
- **Employee Engagement** – Completed a County-wide employee engagement survey; next steps include sharing the results of the survey County-wide and determining best practices for responding to the results.
- **Employee & Labor Relations** – negotiated 30 labor agreements and 51 memorandum of agreements implemented.

Benefits

- Accomplished two multi-year goals – benefit reserves have been collected and fully stated within fund 760 for 20/21 budget, and benefit claims margins are fully funded. Attained milestones in business process analysis, internal analytics, and benchmarking.

Risk

- Implemented an updated RMIS system in the fall of 2019, replacing the County's existing legacy system. Countless efficiency improvements are emerging, thereby reducing administrative burden and allowing more time-toward analysis and management of program.

Human Resources

Significant Changes from 2019/20

\$ Amount	Description	Service Level Impact, including citizens & staff
\$55,000	Reduced Office Furniture & Equipment (437260)	Internal to Human Resources only
\$22,000	Reduced Professional Services – Arbitrations (431000)	Internal to Human Resources; potentially departments
\$20,000	Reduced Training (439200)	Internal to County departments
\$15,000	Reduced A- Team (439211)	Internal to County employees
\$10,000	Reduced Advertising (432400)	Internal to Human Resources; potentially departments
\$10,000	Reduced Computers Non-Capital (421210) and Computer Equipment & Repair (437210)	Internal to Human Resources only
\$5,000	Reduced Printing & Duplicating Services (434100)	Internal to Human Resources only
\$2,000	Reduced Travel and Per Diem line (433100)	Internal to Human Resources only



Questions?



Human Resources

Department Mission

The mission of the Department of Human Resources (HR) is to provide employment, benefits and wellness, risk management and workforce planning services to County Departments so they can have the resources they need to provide high quality services and achieve their strategic results.

Human Resources Department				
Evelyn Minor-Lawrence, Director FTE 43 Total Proposed \$72,262,970 General Fund Support \$ 1,192,986				
Administration Evelyn Minor-Lawrence, Director Total Proposed \$1,603,260 Gen Fund \$ 281,075	Employee & Labor Relations Eric Sarha, Deputy Director/ Chief Negotiator Total Proposed \$673,462 Gen Fund \$ 236,211	Workforce Design Evelyn Minor-Lawrence, Director Total Proposed \$2,663,726 Gen Fund \$ 675,700	Benefits Administration Kristi Durham, Benefits Manager Total Proposed \$49,015,767 Gen Fund \$ -	Risk Administration Eric Machado, Risk Manager Total Proposed \$18,306,755 Gen Fund \$ -
Office of the Director/ Administrative Svc Evelyn Minor-Lawrence, Director FTE 4.0 (Total Staff 6.0)* Total Proposed \$906,120 Gen Fund \$ 217,904	Employee & Labor Relations Eric Sarha, Assistant Director/ Chief Negotiator FTE 2.5 (Total Staff 3.0)* Total Proposed \$673,462 Gen Fund \$ 236,211	Classification & Compensation Heather Pedersen, Class & Comp Manager FTE 4.0 Total Proposed \$966,610 Gen Fund \$ 319,901	Benefits & Wellness Kristi Durham, Benefits Manager FTE 11.25 (Total Staff 11.0)* (Plus temporary FTE) Total Proposed \$49,015,767 Gen Fund \$ -	Risk & Safety Management Eric Machado, Risk Manager FTE 8.75 (Total Staff 6.0)* Total Proposed \$18,306,755 Gen Fund \$ -
Workforce Data Management Krista Weatherford, HR Business Systems Manager FTE 4.5 (Total Staff 5.0)* Total Proposed \$697,140 Gen Fund \$ 63,171				
		Recruitment and Selection JJ Peters, Recruitment Manager FTE 6.0 Total Proposed \$1,087,225 Gen Fund \$ 136,821		
		Workforce Development & Planning Jeri Oswalt, Learning & Development Manager FTE 2.0 Total Proposed \$609,891 Gen Fund \$ 218,978		

* Certain positions in the Director's Office, Administrative Services, Workforce Data Management, and Employee and Labor Relations are budgeted in both Human Resources (General Fund) as well as Benefits and Wellness Administration (Fund 760) and Risk Administration (Fund 761). The Total Staff figure reflects the number of employees performing the work organizationally, rather than how they are accounted for budgetarily within the department.



Administration

Office of the Director/Administrative Services

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

The Office of the Director and Administrative Services programs proposes a \$906,120 budget, reflecting a continuation of current funding and service levels. In addition to our strategic efforts to partner with our customers, the two main initiatives for the Director's Office have been addressing the County's Internal Complaints Process and updating County employment policies.

Our efforts to provide excellent customer service and strategic partner consultative services have continued 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.

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 to date include development of a County intranet page, an expanded complaint packet, expansion of investigator resources, and continued evaluation of our record-keeping practices. We will continue to make progress on the specific actions that will address the recommendations during FY 20/21.

Employee Policy and Practices (EPP)/County Code Integration

After conducting analysis of existing policies and human resources related language in the County Code, this project is transitioning to actual policy development. We retained the expertise of an external consultant to focus on policy revisions, and to date have significant edits to five key County policies. Three of these policies are in the final stages of approval and implementation. We anticipate employing additional resources so this critical project continues to move forward.

Key Performance Measures

		FY 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Result	By 2021, 90% of Clackamas County managers agree or strongly agree that Human Resources is a strategic business partner.	92%	90%	90%	93%	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.	n/a	80%	80%	100%	80%
Output	Number of revised Employee Policies and Procedures and County Code.	0	8	10	3	10

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



Budget Summary

	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Charges for Service	502,019	545,456	651,249	650,863	687,132	35,883	5.5%
Other Revenues	2,915	1,808	870	870	1,087	217	24.9%
Operating Revenue	504,934	547,264	651,733	651,733	688,219	140,955	25.8%
Total Rev - Including Beginning Bal	504,934	547,264	651,733	651,733	688,219	140,955	5.6%
Personnel Services	642,592	698,662	620,144	613,871	580,172	(39,972)	-6.4%
Materials & Services	114,042	100,467	222,415	128,994	277,561	55,146	24.8%
Cost Allocation Charges	46,787	46,845	48,997	48,997	48,387	(610)	-1.2%
Operating Expenditure	803,421	845,974	891,556	791,862	906,120	14,564	1.6%
Total Exp - Including Special Categories	803,421	845,974	891,556	791,862	906,120	14,564	1.6%
General Fund Support (if applicable)	196,066	187,390	284,202	153,699	217,901	(66,301)	-23.3%
Full Time Equiv Pos (FTE) Budgeted	5.00	5.00	4.00	4.00	4.00	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	5.00	5.00	-	4.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes



Administration

Workforce Data Management

Purpose Statement

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

Performance Narrative Statement

The Workforce Data Management program proposes a budget of \$697,140 for fiscal year 20/21, and has two major initiatives in addition to the day-to-day transaction processing, system maintenance, and data quality work.

ERP Strategic Planning

In the FY 20/21 budget year, the WDM will work with executives from Human Resources, Finance, Information Services as well as County Administration to finish the business analysis review for Finance. The completion of the business and technical gap review for Finance will put both departments on the same playing field for a cost benefits analysis of the recommended paths. With the completion of cost benefit analysis, the ERP Strategy team will provide the Board of Clackamas County with the data and cost of the options available to the county for our ERP system. This final piece of data will help make decisions in moving the county forward in the selection of a path for this critical system tool.

Data Analytics

In the FY20/21 budget year, the WDM unit completed training in the area of Data Analytics specifically use of Microsoft Power BI tool. The training helped provided better analytics to answer questions such the cost of employment claims and the demographic of employee discipline.

For the FY 20/21 budget year, the WDM unit plans to be part of an establishment of a data analytics community of practice. The group can help guide the county in selection of the best tools to fit our needs as well as advise county in data analytics practices as the county grows into their goal of being a data driven agency.

Key Performance Measures

		FY 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Result	95% of departments submitting Personnel Actions not needing material corrections.	81%	85%	95%	85%	95%
Output	Number of data transactions provided	9,448	9,000	9,000	12,378	9,900
Output	Number of Managers and staff trained (removed)	62	60	Discontinue	n/a	n/a

Explanation of measures

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 only 85% of transactions submitted to Human Resources is correct. One way to address the 15% of transactions that are incorrect is to provide 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. The new training improved transaction quality approximately 20%, but has plateaued. Our goal for the FY 20/21 year is to add specific training for the PA Processors to continue to educate them in the accurate processing of employee transactions. We hope to improve our numbers of PA's not needing material corrections to 95% for the fiscal year 20/21.

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



Administration

Workforce Data Management

Budget Summary

	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Charges for Service	564,771	613,638	732,221	732,221	633,208	(99,013)	-13.5%
Other Revenues	2,040	1,265	978	978	761	(217)	-22.2%
Operating Revenue	566,811	614,903	733,199	733,199	633,969	(99,230)	-13.5%
Total Rev - Including Beginning Bal	566,811	614,903	733,199	733,199	633,969	(99,230)	-13.5%
Personnel Services	446,016	489,012	694,666	690,605	633,208	(61,458)	-8.8%
Materials & Services	128,297	113,025	250,217	145,119	30,061	(220,156)	-88.0%
Cost Allocation Charges	32,751	32,792	34,298	34,298	33,871	(427)	-1.2%
Operating Expenditure	607,064	634,829	979,181	870,022	697,140	(282,041)	-28.8%
Total Exp - Including Special Categories	607,064	634,829	979,181	870,022	697,140	(282,041)	-28.8%
General Fund Support (if applicable)	137,246	131,173	198,942	107,590	63,171	(135,771)	-68.2%
Full Time Equiv Pos (FTE) Budgeted	3.50	3.50	4.50	4.50	4.50	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	3.50	3.50	-	4.50	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes



Employee and Labor Relations

Employee and Labor Relations

Purpose Statement

The purpose of the Employee and Labor Relations program is to provide discipline administration, collective bargaining and labor contract administration services to the BCC, County Administration, and Departments so they can gain the tools to manage a productive workforce and maintain good employee and labor relations.

Performance Narrative Statement

The Employee and Labor Relations program proposes a \$673,462 budget, reflecting a continuation of current funding and service levels.

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 Federation of Parole and Probation Officers union (FOPPO) for their contract ending June 30, 2020. Negotiations are slated to begin shortly with the Peace Officers Association (POA) for their contract that also expires on June 30, 2020.

During the upcoming FY 20/21, negotiations will commence with the County's largest union, the Employees' Association (EA) and the American Federation of State County and Municipal Employees (AFSCME). We will also begin to bargain the implementation of the County's findings related to the Equal Pay Audit.

Key Performance Measures

		FY 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Result	80% of grievances resolved prior to arbitration	n/a	65%	65%	47%	65%
Output	Number of disciplinary actions involving economic loss	13	8	18	10	18
Output	Number of collective bargaining agreements and/or other labor agreements negotiated to resolution	10	7	7	6	6
Output	90% of managers and supervisors attending employee/labor relations training courses	n/a	80%	80%	0%	80%
Output	Number of implemented performance improvement plans, work plans and/or other similar performance management related tools	102	Discontinue	n/a	n/a	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



Employee and Labor Relations

Employee and Labor Relations

Budget Summary

	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Charges for Service	313,762	340,910	406,789	406,789	436,708	29,919	7.4%
Other Revenues	1,457	904	543	543	543	-	0%
Operating Revenue	315,219	341,814	407,332	407,332	437,251	29,919	7.3%
Total Rev - Including Beginning Bal	315,219	341,814	407,332	407,332	437,251	29,919	7.3%
Personnel Services	318,583	349,294	385,926	383,670	436,708	50,782	13.2%
Materials & Services	71,276	62,792	139,010	80,622	212,561	73,551	52.9%
Cost Allocation Charges	23,393	23,423	24,499	24,499	24,193	(306)	-1.2%
Operating Expenditure	413,252	435,509	549,435	488,791	673,462	124,027	22.6%
Total Exp - Including Special Categories	413,252	435,509	549,435	488,791	673,462	124,027	22.6%
General Fund Support (if applicable)	98,033	93,695	142,101	76,850	236,211	94,110	66.2%
Full Time Equiv Pos (FTE) Budgeted	1.50	2.50	2.50	2.50	2.50	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	1.50	2.50	-	2.50	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

No significant changes at this time.



Workforce Design

Classification and Compensation

Purpose Statement

The purpose of the Classification and Compensation program is to provide up-to-date plans, positions and organizational structure consultation services to County Departments so they can structure their organizations in a way that places the right person in the right classification at the appropriate pay to achieve their operational and strategic results.

Performance Narrative Statement

The Classification and Compensation program proposes a \$966,610 budget, reflecting a continuation of current funding and service levels. 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.

Equal Pay Analysis

On June 1, 2017, Governor Kate Brown signed into law House Bill 2005, also known as the Oregon Equal Pay Law, expanding pay equity protections to Oregonians and creating new obligations for Oregon employers. As part of implementing this new law, Human Resources, in coordination with County Counsel, went out for an RFQ soliciting quotes for a consultant to conduct an Equal Pay Analysis and hired a consultant in November 2018.

The Equal Pay Analysis was kicked off in February of 2019 and to date, all County employees have been surveyed regarding their individual jobs and classifications. In addition to assigning jobs to Work of Comparable Character groupings, the consultant will also be analyzing individual compensation based on those groupings. The consultant will recommend modifications to County compensation structures, systems, policies and to individual compensation to eliminate any unlawful wage disparities.

Structured Classification Reviews

Clackamas County has close to 500 unique classifications. Many of these classifications are outdated and in need of review and market analysis to ensure they accurately reflect the business needs of the County, are internally aligned, and placed at the appropriate salary grade.

This initiative seeks to ensure that all county classifications are reviewed for alignment with business needs and market compatibility 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 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Result	By 2025 2021, 100% of County classifications will be reviewed for alignment with County business needs and market comparability within the past five years.	38%	60%	20%	33%	20%
Output	Number of position allocations, recommendations and determinations provided	185	257	250	124	250
Output	Number of market studies conducted (individual classifications and job families)	56	70	70	30	70

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



Workforce Design

Classification and Compensation

Budget Summary

	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Charges for Service	502,019	545,456	650,863	650,863	645,839	(5,024)	-0.8%
Other Revenues	2,332	1,446	870	870	870	-	0%
Operating Revenue	504,351	546,902	651,733	651,733	646,709	(5,024)	-0.8%
Total Rev - Including Beginning Bal	504,351	546,902	651,733	651,733	646,709	(5,024)	-0.8%
Personnel Services	509,732	558,871	617,481	574,530	645,839	28,358	4.6%
Materials & Services	114,042	100,467	222,415	128,994	282,061	59,646	26.8%
Cost Allocation Charges	37,429	37,476	39,198	39,198	38,710	(488)	-1.2%
Operating Expenditure	661,203	696,814	879,094	742,722	966,610	87,516	10.0%
Total Exp - Including Special Categories	661,203	696,814	879,094	742,722	966,610	87,516	10.0%
General Fund Support (if applicable)	156,853	149,912	227,362	122,959	319,901	92,539	40.7%
Full Time Equiv Pos (FTE) Budgeted	3.00	3.00	4.00	4.00	4.00	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	3.00	3.00	-	3.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	1.00	-	-	0%

Significant Issues and Changes



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

The Recruitment and Selection Program proposes a budget of \$1,087,225 reflecting a continuation of current funding and service levels.

Initiative Overviews/Status:

The recruitment and selection team continues to work closely with the classification and compensation team and other key stakeholders to review, and update as necessary, the tools, data and procedures related to job offers to fully implement the Equal Pay Act.

Significant Issues or Changes:

Implementation of the Equal Pay Act.

Hiring Freeze and the Exception Approval Process put in place by the County Administrator on June 12, 2019 and recently updated on April 6, 2020.

Another significant change is the impact of the COVID-19 event on county operations. Preparations for social distancing precautions for interviews and testing earlier in the month of March as well as when the county re-opens to the public after the closure of county buildings from March 18 – to present significantly impacted recruitment operations and caused significant delays in many recruitments. It is expected we will see additional and more significant impact to the future quarter's results pending the length of shelter in place orders and long term impacts from this pandemic event.

		Key Performance Measures				
		FY 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Result	70% of open positions are filled within 90 days from the date of requisition	59%	65%	65%	42%	65%
Output	Number of hires per year	306	320	320	150	320
Output	Number of job postings (recruitments) per year	270	260	260	116	260
Output	Number of recruitment outreach events per year	25	24	24	11	24

A note regarding the "FY 17-18 Actual" drop in % of positions filled in 90 days result: this shortfall is due in part, if not totally, to two factors: 1) a business process change that was made effective October 15, 2018 to create "cert only" job requisitions within 2 business days of notification from the department that they are ready to fill the vacancy. Prior to this change, this type of job requisition had not been created until it was known for sure if the position would be filled as a "cert only" or require a new recruitment; 2) a second business process change, made effective December 3, 2018. If a job requisition is cancelled and replaced with another job requisition due to an inability to make a hire, the new (replacement) job requisition creation date is retro-activated to the date the original job requisition was created in order to capture the data more accurately. The prior business processes needed to be changed because they did not accurately capture the actual time it took to fill these vacancies.

A note regarding the "FY 19-20 Actuals as of 12/31/19" drop in % of positions filled in 90 days result: in addition to the two business process changes previously described, three additional influencers of this result are: 1) impacts of the hiring freeze that went into effect June 12, 2019 (departments paused a number of recruitments to more closely consider the necessity of filling their vacancies); 2) significant progress was made during this period to reduce the long standing recruitment backlog; while this is great news it negatively impacted this period's result due to the significant length of time some of these recruitments had been waiting prior to assignment; 3) additional steps/approvals at the job offer stage of the selection process necessitated by the Equal Pay Act required additional staff time to thoroughly review, consult, research, recommend and obtain approval for upper step appointments. All three of these factors negatively impacted this result.

It has become clear that the target for this result is no longer realistic for the reasons listed in the notes below regarding the FY Actuals. However, after discussion with the County Administrator, we agreed we will continue to track this result but not set a new target at this time since we will continue to evaluate and consider changes to our business processes and procedures as we work with Trupp on the EPA project. This result will likely be replaced by FY 2023-24. While the length of time it takes to fill vacancies is important, our focus and attention will need to shift to focus on reviewing and implementing updated HR business processes related to equity, diversity and inclusion and to comply with the Equal Pay Act. We plan to identify a new result addressing one or both of these areas by FY 2023-24.

Program includes:

Mandated Services	<input type="checkbox"/>
Shared Services	<input type="checkbox"/>
Grant Funding	<input type="checkbox"/>

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



Workforce Design

Recruitment and Selection

Budget Summary

	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Charges for Service	753,028	818,183	976,295	976,295	949,100	(27,195)	-2.8%
Other Revenues	3,497	2,169	1,304	1,304	1,304	-	0%
Operating Revenue	756,525	820,352	977,599	977,599	950,404	(27,195)	-2.8%
Total Rev - Including Beginning Bal	756,525	820,352	977,599	977,599	950,404	(27,195)	-2.8%
Personnel Services	764,598	838,306	926,222	920,807	949,100	22,878	2.5%
Materials & Services	171,063	150,700	333,623	193,492	80,061	(253,562)	-76.0%
Cost Allocation Charges	50,716	56,144	56,134	56,138	58,064	1,930	3.4%
Operating Expenditure	986,377	1,045,150	1,315,979	1,170,437	1,087,225	(228,754)	-17.4%
Total Exp - Including Special Categories	986,377	1,045,150	1,315,979	1,170,437	1,087,225	(228,754)	-17.4%
General Fund Support (if applicable)	235,279	224,869	341,043	184,439	136,821	(204,222)	-59.9%
Full Time Equiv Pos (FTE) Budgeted	6.00	6.00	6.00	6.00	6.00	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	6.00	6.00	-	6.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

No significant changes at this time.



Workforce Design

Workforce Development and Planning

Purpose Statement

The purpose of the Workforce Planning and Development program is to provide informal/formal learning events and individual development planning with advanced planning consultations and strategic business plan integration services to County Departments and agencies so they can anticipate and respond to the departments' current and future workforce needs.

Performance Narrative Statement

The Workforce Development and Planning program proposes a \$609,891 budget, reflecting a continuation of current funding and service levels.

Workforce Planning and Development resources provide for the development, purchase and delivery of employee development services primarily in the form of learning events and training content. Individualized workforce planning services for departments and the County at large. Supporting effective supervision of employees across the County while supporting Performance Clackamas and Core Values by linking these programs to employee performance.

Program Projects

- In 2018 31% of employees received a documented performance review. In 2019 our goal was for 50% of employees to receive a documented performance review - 77% was achieved, increasing to 95% in 2020. At the same time increasing the quality and effectiveness of the supervision and the new Clarify, Converse, Capture process. This is a dramatic change in culture for the County and will require ongoing attention. New tools/templates, communication models, reports and systems have been created. To gain and maintain traction with the updated processes and provide all of these supports, we will continue to partner and engage with Departments and employees. This includes content delivered at New Employee Workshops and a required training for everyone with a direct report.
- During FY 20/21, completion of establishing core supervisory responsibilities through research, assessment and interaction with stakeholders. These standards will better enable the development of training, the establishment of positions and holding employees accountable for this portion of their work.
- During FY 20/21, continue to create a broader range of learning resources. By establishing a mobile learning platform as well as a library of online content employees can access content anytime anywhere regardless of their work schedule or location. Additionally we have formed new partnerships with organizations like Learning Point to provide increased options for content, schedule and location. These partnerships will continue.
- HR sponsored management training has become fractured with content being provided from multiple program areas. During FY 20/21 we will rebuild to create a cohesive curriculum - that will integrate Clarify Converse Capture, Core Values, core supervisory expectations, and reflect the needs of our workforce and organization. We may propose moving management training to an Academy or certification model in order to increase the visibility and participation in this curriculum.
- A professional, County-wide employee engagement survey was completed in February 2020 through a partnership with consultant TalentMap. Continuing into FY 20/21, we will share the results of the survey County-wide, and determine best practice for responding to the results. This will include working with County Administration and other departments, union leaders, and other key stakeholders.
- Meeting departments where they are at with Workforce Planning will be a focus in FY 20/21. We will connect with the 83% of departments that already have workforce planning elements included in their strategic business plans to determine how best to support them.

Key Performance Measures

		FY 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Result	By 2021 90% of County departments will have workforce planning elements integrated into their strategic business plan	NEW	71%	85%	83%	85%
Result	By 2020 95% of employees will have a documented performance summary	NEW	50%	95%	77%	95%
Result	90% of Learning & Development participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time	95%	95%	95%	93%	95%
Output	Number of employees engaging with the Leadership Academy	45	44	45	78	45
Output	Number of County employees registered for formal learning events	NEW	2000	2000	869	2000
Output	Number of County employees participating in formal and informal learning events	2235	2800	2800	1000	2800
Output	Number of workforce plans developed	0	Discontinue		N/A	N/A

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

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



Workforce Design

Workforce Development and Planning

Budget Summary

	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Charges for Service	251,009	272,728	325,432	325,432	390,476	65,044	20.0%
Other Revenues	1,166	723	435	435	435	-	0%
Operating Revenue	252,175	273,451	325,867	325,867	390,911	65,044	20.0%
Total Rev - Including Beginning Bal	252,175	273,451	325,867	325,867	390,911	65,044	20.0%
Personnel Services	254,866	279,435	308,741	306,936	390,476	81,735	26.5%
Materials & Services	57,021	50,233	111,208	64,497	200,061	200,061	79.9%
Cost Allocation Charges	18,715	18,738	19,599	19,599	19,354	(245)	-1%
Operating Expenditure	330,602	348,406	439,548	391,032	609,891	281,551	38.8%
Total Exp - Including Special Categories	330,602	348,406	439,548	391,032	609,891	281,551	38.8%
General Fund Support (if applicable)	78,426	74,956	113,681	61,480	218,980	105,299	92.6%
Full Time Equiv Pos (FTE) Budgeted	2.00	2.00	2.00	2.00	2.00	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	2.00	2.00	-	2.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

No significant changes at this time.



Benefits and Wellness Administration

Benefits and Wellness

Purpose Statement

The purpose of the Benefits and Wellness program is to provide cost-effective, responsive and comprehensive benefit services to County departments, current and retired employees and their family members so they can better serve the residents of Clackamas County.

Performance Narrative Statement

For FY 20/21, the Benefits and Wellness program proposes a \$49,015,767 budget, reflecting a continuation of current funding and service levels. In addition to continuing to offer a very competitive employee benefits package in support of our mission, the Benefits and Wellness division is increasing compliance, customer service and administrative efficiencies through the following focal areas:

FY 19/20 Budget and contracts are compliant

- Reserves have been collected and fully stated within fund 760 for 20/21 budget
- Claims margins are fully funded
- Benefits contracts have been vetted through procurement process

Leave and disability administration

- Business partner assignments to departments
- Focus on customer service and case management
- Business partners focused on leave administration instead of split with workers comp.
- Continue to prioritize and implement business process recommendations
- Future: improved disability analytics and vendor partnership to achieve goal of 80% of employees return to work within 90 days of initial non-occupational short-term disability

Benefits and Wellness Administrative Efficiencies

- New employee orientation streamlined
- Continue: Business process analysis, internal analytics and benchmarking
- Continue: Improved reporting and visibility to be able to identify program trends

Key Performance Measures

		FY 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Result	90% of Expected/Open Leave Cases in PeopleSoft HR are accurate	NEW	90%	95%	95%	95%
Result	80% of employees return to work within 180 days of initial non-occupational disability claim	NEW	80%	85%	79%	85%
Result	90% of Wellness class surveys indicate "agree" or "strongly agree" that the class contributes to well-being	NEW	90%	90%	94%	90%
Output	Number of Providence medical enrollments	1102	Discontinue		N/A	N/A
Output	Number of Kaiser medical enrollments	771	Discontinue		N/A	N/A

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.



Benefits and Wellness Administration

Benefits and Wellness

Budget Summary

	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	4,435,386	7,742,662	12,245,898	12,245,898	16,961,658	4,715,760	38.5%
Prior Year Revenue	28,762,745	29,328,339	29,334,348	30,846,279	30,246,320	911,972	3.1%
Charges for Service	2,119,702	3,498,357	3,341,545	3,846,673	1,807,789	(1,533,756)	-45.9%
Operating Revenue	30,882,447	32,826,696	32,675,893	34,692,952	32,054,109	(621,784)	-1.9%
Total Rev - Including Beginning Bal	35,317,833	40,569,358	44,921,791	46,938,850	49,015,767	4,093,976	9.1%
Personnel Services	1,385,860	1,584,032	1,707,589	1,518,268	1,687,370	(20,219)	-1.2%
Materials & Services	26,070,040	26,640,858	32,716,306	28,329,296	35,822,378	3,106,072	9.5%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	119,272	98,570	129,628	129,628	136,892	7,264	5.6%
Operating Expenditure	27,575,172	28,323,460	34,553,523	29,977,192	37,646,640	3,093,117	9.0%
Special Payments	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	2,434,552	-	2,434,552	-	0%
Contingency	-	-	7,933,716	-	8,934,575	1,000,859	12.6%
Total Exp - Including Special Categories	27,575,172	28,323,460	44,921,791	29,977,192	49,015,767	4,093,976	9.1%
General Fund Support (if applicable)	-	-	-	-	-	-	0%
Full Time Equiv Pos (FTE) Budgeted	9.64	11.25	11.25	11.25	11.25	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	9.64	10.25	-	10.25	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	1.00	-	1.00	-	-	0%

Significant Issues and Changes

1. Charges for service have decreased 46% due to completely funding the reserves in FY 19-20 and instituting a "credit" for less predictable revenue that was collected in FY 18-19.

2. Materials and services have increased 9.5% due to the following areas:

- FY 20-21 budget captures the total cost of the Providence Administration fee, rather than subtracting the reimbursements, which was how the number was expressed in the FY 19-20 budget. Additionally the fees have increased for FY 20-21.
- Projected increases in medical claims for the retiree population.
- The remainder are additional increases expected for medical claims across all populations.

3. Contingency is down 16%. However our most recent 4/13/20 projections indicate a contingency of 8,934,575 which is an 12.6% increase, due to medical claims to date costing less than projected.



Risk Administration

Risk Management Program

Purpose Statement

The purpose of the Risk Management program is to provide loss prevention and control, liability and workers' compensation administration, consultations and analysis services to County departments so they can create a workplace culture committed to practices that eliminate risk, sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

The Risk and Safety Management program proposes a \$18,306,755 budget, reflecting a continuation of current funding and service levels. The purpose of the Risk Management program is to provide loss prevention and control, liability and workers' compensation administration, consultations and analysis services to County departments and agencies so they can create a workplace culture committed to practices that eliminate risk, sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative

The Risk and Safety Management resources provide for the administration of the entire program and include the necessary reserves to meet our substantial self-insured liabilities.

Program Projects:

- New Risk Management Information System (RMIS) implementation; Implementation of an updated RMIS system went live in the fall of 2019, replacing the County's existing legacy system. Countless efficiency improvements are emerging, thereby reducing administrative burden and allowing more time toward analysis and management of program.
- Drug and Alcohol Policy; project to standardize various drug and alcohol policies into just two policies, one for Department of Transportation (DOT) related positions and one non-DOT positions, regardless of bargaining group. Work ongoing with bargaining groups to remove language from CBAs and in the final stages.
- Reorganization of Workers' Compensation/Leave Administration group; efforts to establish a dedicated Workers' Compensation position, along with a dedicated Leave Administration position have been well received. We were able to leverage and reorganize existing FTE (no positions created or cut) to better serve both the WC and Leave Administration sides of the business.

Key Performance Measures

		FY 17-18 Actual	FY 18-19 Target	FY 19-20 Target	FY 19-20 Actuals as of 12/31/19	FY 20-21 Target
Results	Experience Modification Rate will be 1 or less	0.76	1 or less	1 or less	0.71	1 or less
Results	Each year the ratio of liability claims paid, when compared to the actuarial recommendation is 1 or less	0.50	1 or less	1 or less	0.46	1 or less
Output	Number of ergonomic assessments provided quarterly	17.25	20	20	40	20
Output	Number of workers' compensation claims processed quarterly	27.75	28	28	32	28
Results	Beginning with 10% of departments in 2018 and increasing by 10% each year through 2021 (40%), departments will have no increase in their number of Workers' Compensations claims per employee (FTE)	n/a	n/a		Discontinue	N/A

Performance Measures Narrative

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 Experience Modification Rate (EMR) results measure is another way to compare us to our industry peers. EMR 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 better than average.

I've discontinued tracking the department increase in workers' compensation measure as this wasn't my measure to begin with and I can always find a department with no increase. It didn't seem to provide value moving forward.

The "Outputs" are broken down into two categories; Ergonomics show the number of ergonomic assessments we anticipate and perform per quarter. We realigned this part of the program last year, and as a result have seen a large catch-up in the first half of the 18/19 year on a backlog of assessments dating back to the 17/18 year.

Workers' compensation claims have been very steady. An upcoming reorganization in the management of that function along with an improved software tool (both noted in Program Projects) will focus more FTE on the management of the individual claims themselves and less on the administrative burden of prior practices.

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



	FY 17-18 Actual	FY 18-19 Actual	FY 19-20 Amended Budget	FY 19-20 Projected Year End	FY 20-21 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	10,030,371	11,958,874	12,683,491	12,683,491	13,111,059	427,568	3.4%
Charges for Service	5,706,537	4,863,700	5,165,000	5,165,000	5,020,696	(144,304)	-2.8%
Other Revenues	259,904	346,312	266,462	187,355	175,000	(91,462)	-34.3%
Operating Revenue	5,966,441	5,210,012	5,431,462	5,352,355	5,195,696	(235,766)	-4.3%
Total Rev - Including Beginning Bal	15,996,812	17,168,886	18,114,953	18,035,846	18,306,755	191,802	1.1%
Personnel Services	1,068,443	957,189	1,398,937	1,273,508	1,449,212	50,275	3.6%
Materials & Services	2,877,972	3,418,999	3,708,942	3,547,111	3,828,489	119,547	3.2%
Interfund Transfer	-	-	-	-	1,000,000	1,000,000	0%
Cost Allocation Charges	91,522	109,207	104,168	104,168	103,612	(556)	-0.5%
Operating Expenditure	4,037,937	4,485,395	5,212,047	4,924,787	6,381,313	1,169,266	22.4%
Reserve for Future Expenditures	-	-	3,446,102	-	3,121,306	(324,796)	-9.4%
Contingency	-	-	9,456,804	-	8,804,136	(652,668)	-6.9%
Total Exp - Including Special Categories	4,037,937	4,485,395	18,114,953	4,924,787	18,306,755	191,802	1.1%
General Fund Support (if applicable)	-	-	-	-	-	-	0%
Full Time Equiv Pos (FTE) Budgeted	8.16	8.16	8.75	8.75	8.75	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	8.16	8.16	-	8.75	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes