
Human Resources

Budget Presentation
FY24-25





Human Resources Department (16)

Department Budget Summary by Fund

Line of Business Name	Program Name	FY24-25	FY24-25	FY24-25	FY24-25	FY24-25	% of	FY24-25 FTE **		
		General Fund (100)	Self-Insurance Fund (760)	Risk Mgmt Claims Fund (761)	Total Budget	General Fund Support in Budget*	Total	Total	Filled	Vacant
Administration	Director's Office	1,060,245			1,060,245	219,196	21%	5.0	3.5	1.5
	Workforce Data Management	1,082,861			1,082,861	215,435	20%	5.5	4.5	1.0
Employee & Labor Relations Management	Employee & Labor Relations	748,197			748,197	84,510	11%	2.5	2.5	-
									-	-
Workforce Design	Classification & Compensation	1,231,693			1,231,693	363,289	29%	6.0	5.0	1.0
	Recruitment & Selection	1,707,425			1,707,425	285,271	17%	9.0	9.0	-
	Workforce Planning & Development	564,158			564,158	192,299	34%	2.0	2.0	-
Benefits, Wellness, Leave Management	Benefits Administration		4,356,443		4,356,443	-	0%	15.3	14.0	1.3
	Medical Insurance		53,682,505		53,682,505	-	0%	-	-	-
	Dental Insurance		5,214,192		5,214,192	-	0%	-	-	-
	Disability Insurance		1,987,124		1,987,124	-	0%	-	-	-
	EAP/Wellness		787,126		787,126	-	0%	-	-	-
	Deferred Compensation		6,971		6,971	-	0%	-	-	-
Risk & Safety Management	Risk Administration			1,932,140	1,932,140	-	0%	8.5	8.3	0.3
	Casualty/Liability			11,963,058	11,963,058	-	0%	-	-	-
	Workers' Compensation			4,358,367	4,358,367	-	0%	-	-	-
	Unemployment			507,315	507,315	-	0%	-	-	-
TOTAL		6,394,579	66,034,361	18,760,880	91,189,820	1,360,000	1%	53.8	48.8	5.0
	FY23-24 Budget (Amended)	5,771,134	57,104,362	17,219,768	80,095,264	1,288,584	2%	54.8	48.8	6.0
	\$ Increase (Decrease)	623,445	8,929,999	1,541,112	11,094,556	71,416		1.0	0.0	1.0
	% Increase (Decrease)	11%	16%	9%	14%	6%		-2%	0%	-17%

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

** FY24-25 FTE aligns to department's final budgeted All Position Report (APOS).

16-Human Resources (HR) / 100-General Fund

Summary of Revenue and Expense

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Average
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	103,644	100,000	100,000	164,351	64,351	64%	67,881	142%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits	3,753,355	4,054,670	4,054,672	4,054,672	4,036,077	(18,595)	0%	3,954,232	2%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	10	214,768	327,878	341,200	137,561	(190,317)	-58%	185,326	-26%
Other Interfund Transfers	-	-	-	131,838	696,590	696,590	-	43,946	1485%
General Fund Support	1,323,927	1,292,705	1,288,584	858,331	1,360,000	71,416	6%	1,158,321	17%
Operating Revenue	5,077,292	5,562,143	5,671,134	5,386,041	6,230,228	559,094	10%	5,341,825	17%
Total Revenue	5,077,292	5,665,787	5,771,134	5,486,041	6,394,579	623,445	11%	5,409,707	18%
Personnel Services	3,984,639	4,461,655	4,965,364	4,447,074	5,468,031	502,667	10%	4,297,789	27%
Materials and Services	912,382	850,704	805,770	874,616	926,548	120,778	15%	879,234	5%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expenditure	4,897,021	5,312,359	5,771,134	5,321,690	6,394,579	623,445	11%	5,177,023	24%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	4,897,021	5,312,359	5,771,134	5,321,690	6,394,579	623,445	11%	5,177,023	24%
Revenues Less Expenses	180,271	353,428	-	164,351	-			232,683	

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

Summary of Revenue and Expense

	FY21-22	FY22-23	FY23-24	FY23-24	FY24-25	Budget-to-Budget Changes:		3-Year	% Change
	Actuals	Actuals	Amended Budget	Projected Year-End	Budget	\$ FY23-24 to FY24-25	% FY23-24 to FY24-25	Average	from 3-Year Average
Beginning Fund Balance	22,792,734	24,597,171	25,476,496	26,447,179	29,853,323	4,376,827	17%	24,612,361	21%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits	1,825,986	2,007,487	1,989,008	2,063,136	2,144,596	155,588	8%	1,965,536	9%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	30,987,062	32,183,540	29,638,858	32,460,878	34,036,442	4,397,584	15%	31,877,160	7%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	32,813,048	34,191,026	31,627,866	34,524,014	36,181,038	4,553,172	14%	33,842,696	7%
Total Revenue	55,605,782	58,788,197	57,104,362	60,971,193	66,034,361	8,929,999	16%	58,455,057	13%
Personnel Services	1,276,785	1,809,456	2,414,862	2,048,480	2,499,580	84,718	4%	1,711,574	46%
Materials and Services	29,731,826	30,531,553	35,461,787	29,069,390	36,257,365	795,578	2%	29,777,590	22%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expenditure	31,008,611	32,341,009	37,876,649	31,117,870	38,756,945	880,297	2%	31,489,163	23%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	2,696,590	2,696,590	-	-	-
Contingency	-	-	15,944,474	-	21,228,675	5,284,201	33%	-	-
Reserve for Future Expenditures	-	-	3,283,239	-	3,352,151	68,912	2%	-	-
Total Expense	31,008,611	32,341,009	57,104,362	31,117,870	66,034,361	8,930,000	16%	31,489,163	110%
Revenues Less Expenses	24,597,171	26,447,188	-	29,853,323	-			26,965,894	

16-Human Resources (HR) / 761-Risk Management Claims Fund

Summary of Revenue and Expense

	FY21-22	FY22-23	FY23-24	FY23-24	FY24-25	Budget-to-Budget Changes:		3-Year	% Change
	Actuals	Actuals	Amended Budget	Projected Year-End	Budget	\$ FY23-24 to FY24-25	% FY23-24 to FY24-25	Average	from 3-Year Average
Beginning Fund Balance	12,813,277	12,135,003	11,169,390	11,280,065	10,660,880	(508,510)	-5%	12,076,115	-12%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits	5,136,448	5,190,837	6,000,378	6,000,378	6,000,000	(378)	0%	5,442,554	10%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	36,740	200,183	50,000	100,000	100,000	50,000	100%	112,308	-11%
Other Interfund Transfers	-	-	-	-	2,000,000	2,000,000	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	5,173,188	5,391,020	6,050,378	6,100,378	8,100,000	2,049,622	34%	5,554,862	46%
Total Revenue	17,986,465	17,526,024	17,219,768	17,380,443	18,760,880	1,541,112	9%	17,630,977	6%
Personnel Services	1,316,214	1,382,692	1,496,142	1,532,390	1,660,339	164,197	11%	1,410,432	18%
Materials and Services	4,535,247	4,863,265	4,940,183	5,187,173	5,412,032	471,849	10%	4,861,895	11%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expenditure	5,851,461	6,245,958	6,436,325	6,719,563	7,072,372	636,046	10%	6,272,327	13%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	7,114,443	-	8,018,508	904,065	13%	-	-
Reserve for Future Expenditures	-	-	3,669,000	-	3,670,000	1,000	0%	-	-
Total Expense	5,851,461	6,245,958	17,219,768	6,719,563	18,760,880	1,541,111	9%	6,272,327	199%
Revenues Less Expenses	12,135,003	11,280,066	-	10,660,880	-			11,358,650	

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

Summary of Revenue and Expense

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Average
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	-	-	-	-	-	-	-	-
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	23,506	-	-	-	-	-	-	7,835	-100%
Charges, Fees, License, Permits	-	-	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	23,506	-	-	-	-	-	-	7,835	-100%
Total Revenue	23,506	-	-	-	-	-	-	7,835	-100%
Personnel Services	23,506	-	-	-	-	-	-	7,835	-100%
Materials and Services	-	-	-	-	-	-	-	-	-
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expenditure	23,506	-	-	-	-	-	-	7,835	-100%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	23,506	-	-	-	-	-	-	7,835	-100%
Revenues Less Expenses	-	-	-	-	-	-	-	-	-

Significant Changes from FY23-24 Budget

Program	Change(s)
Director's Office	HR lost 3 critical positions. Due to this loss, HR's professional services costs increased to complete major functions of our department. A limited-term position was also added to provide support across the department and programs.
Workforce Data Management	Upgraded PeopleSoft HR to the latest PeopleTools version to enhance security and better position HR to take advantage of future innovations. With the increased need to support both HR program initiatives and county departments, WDM has added an additional analyst to support these efforts.
Employee and Labor Relations	Lost chief negotiator and grievance investigator. HR outsourced these services, leading to increased spending in Professional Services to ensure due process and union negotiations as we started bargaining six union contracts.
Risk & Safety	Update to the department allocation model for FY24-25 budget. Individual departments allocations changed due to staffing changes. With assistance from the Benefits Self Insurance Fund, \$2M was transferred to Risk & Safety to better allocate excess reserves under HR umbrella.
Benefits and Wellness	Since Sept 2023, the Leave Administration has been contracting with The Standard in administering family, medical, military, and company sponsored leaves. Benefits Admin is in the process of transitioning to a third party administrator to administer benefits to employees.



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Human Resources Department (16)

Department Budget Summary by Fund

Line of Business Name	Program Name	FY24-25	FY24-25	FY24-25	FY24-25	FY24-25	% of	FY24-25 FTE **		
		General Fund (100)	Self-Insurance Fund (760)	Risk Mgmt Claims Fund (761)	Total Budget	General Fund Support in Budget*	Total	Total	Filled	Vacant
Administration	Director's Office	1,060,245			1,060,245	219,196	21%	5.0	3.5	1.5
	Workforce Data Management	1,082,861			1,082,861	215,435	20%	5.5	4.5	1.0
Employee & Labor Relations Management	Employee & Labor Relations	748,197			748,197	84,510	11%	2.5	2.5	-
Workforce Design	Classification & Compensation	1,231,693			1,231,693	363,289	29%	6.0	5.0	1.0
	Recruitment & Selection	1,707,425			1,707,425	285,271	17%	9.0	9.0	-
	Workforce Planning & Development	564,158			564,158	192,299	34%	2.0	2.0	-
Benefits, Wellness, Leave Management	Benefits Administration		4,356,443		4,356,443	-	0%	15.3	14.0	1.3
	Medical Insurance		53,682,505		53,682,505	-	0%	-	-	-
	Dental Insurance		5,214,192		5,214,192	-	0%	-	-	-
	Disability Insurance		1,987,124		1,987,124	-	0%	-	-	-
	EAP/Wellness		787,126		787,126	-	0%	-	-	-
	Deferred Compensation		6,971		6,971	-	0%	-	-	-
Risk & Safety Management	Risk Administration			1,932,140	1,932,140	-	0%	8.5	8.3	0.3
	Casualty/Liability			11,963,058	11,963,058	-	0%	-	-	-
	Workers' Compensation			4,358,367	4,358,367	-	0%	-	-	-
	Unemployment			507,315	507,315	-	0%	-	-	-
TOTAL		6,394,579	66,034,361	18,760,880	91,189,820	1,360,000	1%	53.8	48.8	5.0
FY23-24 Budget (Amended)		5,771,134	57,104,362	17,219,768	80,095,264	1,288,584	2%	54.8	48.8	6.0
\$ Increase (Decrease)		623,445	8,929,999	1,541,112	11,094,556	71,416		1.0	0.0	1.0
% Increase (Decrease)		11%	16%	9%	14%	6%		-2%	0%	-17%

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

** FY24-25 FTE aligns to department's final budgeted All Position Report (APOS).



Administration
Director's Office

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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 04/29/24	FY 24-25 Target
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% ¹	100%	80%	N/A*	80%
Output	Number of revised Employee Policies and Procedures and County Code. ³	5	3	12	7	12
Output (NEW)	Number of Internal Complaints investigated per fiscal year ³	8	14	10	10	7
Result	80% of Clackamas County managers agree or strongly agree that Human Resources is a strategic business partner. ⁴	100% ¹	N/A	80%	N/A*	80%
Output (NEW)	By 2025, all Employment Policies and Practices will be current and reviewed every three years thereafter. ³	5	5	20	N/A**	20

*=Surveys were unable to be conducted during the current FY; **Unable to collect data

Performance Measures Narrative:

*****Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we are do.**

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 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



	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	43,866	-	-	13,979	13,979	-	14,622	-4%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	8,183	-	-	-	-	-	-	2,728	-100%
Charges, Fees, License, Permits, Fines	725,491	629,839	695,612	695,612	694,531	(1,081)	0%	683,647	2%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	44,179	132,539	132,539	-	14,726	800%
General Fund Support	205,691	221,512	214,764	170,271	219,196	4,432	2%	199,158	10%
Operating Revenue	939,365	851,351	910,376	910,062	1,046,266	135,890	15%	900,259	16%
Total Revenue	939,365	895,217	910,376	910,062	1,060,245	149,869	16%	914,881	16%
Personnel Services	724,078	694,669	684,296	669,617	824,363	140,067	20%	696,121	18%
Materials and Services	202,066	229,682	226,080	226,466	235,882	9,802	4%	219,405	8%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	926,144	924,351	910,376	896,083	1,060,245	149,869	16%	915,526	16%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	926,144	924,351	910,376	896,083	1,060,245	149,869	16%	915,526	16%
Revenues Less Expenses	13,222	(29,134)	-	13,979	-	-	-	(645)	-

Notes:
None.



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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 04/29/24	FY 24-25 Target
Result	95% of departments submitting Personnel Actions not needing material corrections.	94% ¹	97% ¹	95%	n/a*	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% ¹	77% ¹	80%	75%	80%
Output	Number of data transactions provided	7,884	20,295 ¹	7,200	9,446	7,200
Output (NEW)	Number of Employee Self Service password resets.	1,349	212 ³	400	780	400
Output (NEW)	Number of HR system enhancements.	19	6 ³	10	2	10
Output (NEW)	Number of HR business process improvements.	14	9 ³	10	n/a**	10
Output	Number of Managers and staff trained (removed)	Discontinue	n/a	n/a	n/a	n/a

*=Surveys were unable to be conducted during the current FY; **=Unable to collect data

*****Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we are do.**

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.

³ Measure is a quarterly reported measure, data reflects data totals up to Q3.

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



160102-Workforce Data Management
 BCC Priority Alignment: Accountable Government

Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	16,812	-	-	60,000	60,000	-	5,604	971%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	602,943	658,230	612,213	612,213	610,894	(1,319)	0%	624,462	-2%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	10	-	-	-	-	-	-	3	-100%
Other Interfund Transfers	-	-	-	50,783	196,532	196,532	-	16,928	1061%
General Fund Support	217,499	221,512	214,764	202,406	215,435	671	0%	213,806	1%
Operating Revenue	820,452	879,742	826,977	865,402	1,022,861	195,884	24%	855,199	20%
Total Revenue	820,452	896,554	826,977	865,402	1,082,861	255,884	31%	860,803	26%
Personnel Services	738,995	821,877	746,638	788,427	949,485	202,847	27%	783,099	21%
Materials and Services	139,269	120,461	80,339	16,975	133,376	53,037	66%	92,235	45%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	878,264	942,337	826,977	805,402	1,082,861	255,884	31%	875,334	24%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	878,264	942,337	826,977	805,402	1,082,861	255,884	31%	875,334	24%
Revenues Less Expenses	(57,812)	(45,783)	-	60,000	-	-	-	(14,532)	-

Notes:
 None.



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

Key Performance Measures

		FY 21-22 Actual	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 04/29/24	FY 24-25 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	90%	90%	N/A*	90%
Result (NEW)	90% of managers/supervisors/will have E&LR training biannually.	0% ²	90%	90%	N/A*	90%
Output	Number of collective bargaining agreements and/or other labor agreements negotiated to resolution.	11	5 ³	5 ³	17	5 ³
Output (NEW)	Number of managers and supervisors completing employee/labor relations training courses.	68 ⁴	171	171	137	171
Output (NEW)	Number of corrective actions involving written reprimand and above vetted with E&LR before imposing.	26	20	20	68	20
Result	80% of grievances resolved prior to arbitration	Discontinue	n/a	n/a	n/a	n/a
Output	Number of disciplinary actions involving economic loss	Discontinue	n/a	n/a	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	n/a	n/a

*=Surveys were unable to be conducted during the current FY

Performance Measures Narrative:

***Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we are do.

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 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 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.



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

Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	10,000	40,000	40,000	90,372	50,372	126%	16,667	442%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	590,625	590,209	566,208	566,208	573,315	7,107	1%	582,347	-2%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	226,333	160,435	58,586	147,817	84,510	25,924	44%	178,195	-53%
Operating Revenue	816,958	750,644	624,794	714,025	657,825	33,031	5%	760,542	-14%
Total Revenue	816,958	760,644	664,794	754,025	748,197	83,403	13%	777,209	-4%
Personnel Services	551,840	489,158	521,957	486,823	559,531	37,574	7%	509,274	10%
Materials and Services	124,445	121,909	142,837	176,830	188,666	45,829	32%	141,062	34%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	676,285	611,067	664,794	663,653	748,197	83,403	13%	650,335	15%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	676,285	611,067	664,794	663,653	748,197	83,403	13%	650,335	15%
Revenues Less Expenses	140,673	149,577	-	90,372	-	-	-	126,874	-

Notes:

This Program has lost a manager/Deputy Director/Chief Negotiator all while in the kickoff of Union contracts negotiations. We have had to use more professional services to fill the gap in staff loss.



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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 04/29/24	FY 24-25 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.	20%	26%	35%	n/a*	35%
Result (NEW)	By 2025, County Departments will have access to tools and data necessary to support hiring decisions. ¹	50%	75%	75%	n/a*	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.	25%	65%	50%	85%	50%
Output	Number of position allocations, recommendations and determinations provided.	362	241	250	248	250
Output	Number of market studies conducted (individual classifications and job families).	80	61	100	50	100
Output (NEW)	Number of new or revised classification specifications.	17	33	24	22	24
Output (NEW)	Number of Equal Pay Analysis recommendations. ²	827	645	700	929	700

*=Surveys were unable to be conducted during the current FY

Performance Measures Narrative:

*****Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we are do.**

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

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

² Current terminology should replace "Equal Pay Analysis Recommendations" with "Salary Placement Approvals".

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



160302-Classification & Compensation
 BCC Priority Alignment: Accountable Government

Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	-	60,000	60,000	-	(60,000)	-100%	20,000	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	661,394	857,801	735,652	735,652	727,500	(8,152)	-1%	751,616	-3%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	36,876	140,904	140,904	-	12,292	1046%
General Fund Support	282,808	177,316	214,764	134,884	363,289	148,525	69%	198,336	83%
Operating Revenue	944,202	1,035,117	950,416	907,412	1,231,693	281,277	30%	962,244	28%
Total Revenue	944,202	1,035,117	1,010,416	967,412	1,231,693	221,277	22%	982,244	25%
Personnel Services	746,558	790,464	899,078	745,931	1,099,547	200,470	22%	760,984	44%
Materials and Services	177,914	73,620	111,338	221,481	132,146	20,808	19%	157,672	-16%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	924,472	864,085	1,010,416	967,412	1,231,693	221,278	22%	918,656	34%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	924,472	864,085	1,010,416	967,412	1,231,693	221,278	22%	918,656	34%
Revenues Less Expenses	19,730	171,032	-	-	-	-	-	63,588	-

Notes:
 None.



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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 04/29/24	FY 24-25 Target
Result	70% of open positions are filled within 90 days from the date of requisition ¹	52%	70%	70%	N/A*	70%
Output	Number of hires per year (including temps and seasonal)	461	320	320	256	320
Output	Number of job postings (recruitments) per year	361	260	260	190	260
Output	Number of recruitment outreach events per year ²	12	24	24	Discontinue	N/A

*=Surveys were unable to be conducted during the current FY

Performance Measures Narrative:

***Note-

HR program areas are in the process of realigning our performance measures to accurately reflect the work we are doing.

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

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	5,000	-	-	-	-	-	1,667	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	706,076	917,449	1,068,733	1,068,733	1,057,978	(10,755)	-1%	897,419	18%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	214,768	327,878	341,200	137,561	(190,317)	-58%	185,323	-26%
Other Interfund Transfers	-	-	-	-	226,615	226,615	-	-	-
General Fund Support	217,500	300,435	370,942	92,230	285,271	(85,671)	-23%	203,388	40%
Operating Revenue	923,576	1,432,652	1,767,553	1,502,163	1,707,425	(60,128)	-3%	1,286,130	33%
Total Revenue	923,576	1,437,652	1,767,553	1,502,163	1,707,425	(60,128)	-3%	1,287,797	33%
Personnel Services	841,932	1,236,741	1,669,214	1,414,281	1,605,187	(64,028)	-4%	1,164,318	38%
Materials and Services	110,345	112,581	98,339	87,882	102,238	3,899	4%	103,603	-1%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	952,277	1,349,322	1,767,553	1,502,163	1,707,425	(60,129)	-3%	1,267,921	35%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	952,277	1,349,322	1,767,553	1,502,163	1,707,425	(60,129)	-3%	1,267,921	35%
Revenues Less Expenses	(28,701)	88,330	-	-	-	-	-	19,876	-

Notes:

Fund 760 will be funding 2 limited-term positions once salary reimbursements end from H3S and County Administration in the Fall of 2024.



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 and team building services. The team, comprised of 2.9 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.

- **Manager Communications and Development:** We are performing a training needs assessment, and defining core competences, for our supervisors and managers. In FY 24/25, we will focus on building a curriculum that will support these leaders of people, clarify performance expectations, and better support them in their complex roles. We host Leadership Academy cohort #9 in 24/25. Through Monthly Manager Meetings (MMM), we continue to support our County Administrator to enhance communications and transparency on important topics.

- **Performance Feedback:** The County's performance feedback process, Clarify, Converse, Capture, remains relevant and useful to all employees. The 24/25 fiscal year brings an opportunity to re-energize this framework with recommendations from our training needs assessment and develop an accountability structure. Prior to putting this framework in place in 2018, less than 40% of employees received reviews. In 2023 we improved to 70%, and our goal is 90% countywide. While this gain is strong, the variance of success across departments is significant. We have 4 below 50%, 5 between 50% and 70%, 7 between 70% and 90%, and 4 at 90% or higher.

- **Organizational Learning and Development:** Countywide offerings remain strong in supporting employees, including organizational skills, project management, conflict management, management, communications, stress management, mental health and wellness. We continue to leverage our online learning platform to expand more efficient and transparent enrollment processes.

- **Employee Engagement:** In FY 24/25, we will partner with Gallup, a new vendor, for our third County-wide employee engagement survey in October 2024. Gallup's survey has fewer questions (up to 20), and the data will be more easily accessible and actionable as compared to the initial two. We also support a team of engagement champions with 14 representatives from across the county whose purpose is to positively influence a work culture where employees are motivated by, passionate about, and invested in the purpose of the work they do, and feel supported and respected.

- **Workforce Planning:** In FY 24/25 we will continue to look at turnover trends and employee engagement data, and other data analytics to help us prepare for the future.

Key Performance Measures

		FY 21-22 Actual	FY 22-23 Actual	FY 23-24 Target	FY 23-24 Actuals as of 04/29/24	FY 24-25 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.	91% ¹	94% ¹	90%	92% ¹	90%
Result	90% of employees will have a documented summary of performance at least annually.	60%	70%	90%	70%	90%
Output (NEW)	Number of Workforce planning consultations.	32	35	50	n/a**	50
Output	Number of County employees engaged in learning events.	9862	1215	2000	1528	2000
Output (NEW)	Number of employees with a documented summary of performance each year.	828	1120	1800	1911	1800
Output	Number of workforce plans developed	n/a	n/a	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	n/a	n/a
Output	Number of employees engaging with the Leadership Academy	Discontinue	n/a	n/a	n/a	n/a
Output	Number of County employees registered for formal learning events	Discontinue	n/a	n/a	n/a	n/a

*=Surveys were unable to be conducted during the current FY; **=Unable to collect data

Performance Measures Narrative:

***Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we are do.

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 system 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 Average percentage of quarterly data

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

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	-	27,966	-	-	-	-	-	9,322	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	466,826	401,142	376,254	376,254	371,859	(4,395)	-1%	414,741	-10%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	174,096	211,495	214,764	110,723	192,299	(22,465)	-10%	165,438	16%
Operating Revenue	640,922	612,637	591,018	486,977	564,158	(26,860)	-5%	580,179	-3%
Total Revenue	640,922	640,603	591,018	486,977	564,158	(26,860)	-5%	589,501	-4%
Personnel Services	389,419	428,747	444,181	341,995	429,919	(14,262)	-3%	386,720	11%
Materials and Services	158,343	192,450	146,837	144,982	134,240	(12,597)	-9%	165,258	-19%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	547,762	621,197	591,018	486,977	564,159	(26,859)	-5%	551,979	2%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	547,762	621,197	591,018	486,977	564,159	(26,859)	-5%	551,979	2%
Revenues Less Expenses	93,160	19,406	-	-	-	-	-	37,522	-

Notes:
None.



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 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 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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 4/29/24	FY 24-25 Target
Result (NEW)	80% of employees return to work within 90 days of initial non-occupational short-term disability.	n/a ¹	90% ³	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.	70%	N/A ²	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.	368	249	450	438	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.	7890	2970	3690	n/a ¹	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:

***Note- HR program areas are in the process of realigning our performance measures to accurately reflect the work we are doing.

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 2023.

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.



Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	2,896,090	2,555,561	3,304,078	2,631,944	1,800,987	(1,503,091)	-45%	2,694,532	-33%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	6,210	-	-	-	-	-	-	2,070	-100%
Charges, Fees, License, Permits, Fines	1,746,745	1,923,516	1,912,764	1,977,630	2,063,985	151,221	8%	1,882,630	10%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	50,369	483,052	150,101	408,798	491,471	341,370	227%	314,073	56%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	1,803,324	2,406,568	2,062,865	2,386,428	2,555,456	492,591	24%	2,198,773	16%
Total Revenue	4,699,415	4,962,129	5,366,943	5,018,372	4,356,443	(1,010,500)	-19%	4,893,305	-11%
Personnel Services	1,285,538	1,809,456	2,414,862	2,048,480	2,499,580	84,718	4%	1,714,491	46%
Materials and Services	858,316	520,719	2,710,751	1,168,905	1,682,368	(1,028,383)	-38%	849,313	98%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	2,143,854	2,330,175	5,125,613	3,217,385	4,181,948	(943,664)	-18%	2,563,805	63%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	241,330	-	174,495	(66,835)	-28%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	2,143,854	2,330,175	5,366,943	3,217,385	4,356,443	(1,010,499)	-19%	2,563,805	70%
Revenues Less Expenses	2,555,561	2,631,954	-	1,800,987	-	-	-	2,329,501	-

Notes:
 None.



Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	16,418,677	18,216,944	17,815,326	19,304,760	23,067,357	5,252,031	29%	17,980,127	28%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	-	352	-	-	-	-	-	117	-100%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	28,265,928	28,510,724	26,972,971	29,235,050	30,615,148	3,642,177	14%	28,670,567	7%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	28,265,928	28,511,076	26,972,971	29,235,050	30,615,148	3,642,177	14%	28,670,684	7%
Total Revenue	44,684,605	46,728,019	44,788,297	48,539,810	53,682,505	8,894,208	20%	46,650,811	15%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	26,467,661	27,423,259	30,167,877	25,472,453	31,746,077	1,578,200	5%	26,454,458	20%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	26,467,661	27,423,259	30,167,877	25,472,453	31,746,077	1,578,200	5%	26,454,458	20%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	2,696,590	2,696,590	-	-	-
Reserve for Future Expenditures	-	-	2,997,000	-	2,965,000	(32,000)	-1%	-	-
Contingency	-	-	11,623,420	-	16,274,838	4,651,418	40%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	26,467,661	27,423,259	44,788,297	25,472,453	53,682,505	8,894,208	20%	26,454,458	103%
Revenues Less Expenses	18,216,944	19,304,760	-	23,067,357	-	-	-	20,196,354	-

Notes:
 None.



Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	1,800,854	1,972,926	2,579,788	2,139,890	2,735,162	155,374	6%	1,971,224	39%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	-	-	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	2,311,624	2,364,497	2,151,212	2,372,724	2,479,030	327,818	15%	2,349,615	6%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	2,311,624	2,364,497	2,151,212	2,372,724	2,479,030	327,818	15%	2,349,615	6%
Total Revenue	4,112,478	4,337,424	4,731,000	4,512,614	5,214,192	483,192	10%	4,320,838	21%
Personnel Services	(2,543)	-	-	-	-	-	-	(848)	-100%
Materials and Services	2,142,095	2,197,534	1,894,788	1,777,452	1,866,325	(28,463)	-2%	2,039,027	-8%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	2,139,552	2,197,534	1,894,788	1,777,452	1,866,325	(28,463)	-2%	2,038,179	-8%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	248,000	-	347,000	99,000	40%	-	-
Contingency	-	-	2,588,212	-	3,000,867	412,655	16%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	2,139,552	2,197,534	4,731,000	1,777,452	5,214,192	483,192	10%	2,038,179	156%
Revenues Less Expenses	1,972,926	2,139,889	-	2,735,162	-	-	-	2,282,659	-

Notes:
 None.



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 21-22 Actuals	FY 22-23 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.	95%	90%	90%	N/A 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.	70%	N/A ²	90%	N/A ²	90%
Output (NEW)	Number of medical leave requests.	368	249	450	438	450

Performance Measures Narrative:

***Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we do.

- 1 This data was not available due to staff changes.
- 2 This data was not collected by the annual survey from the County Administration in Dec 2023.
- 3 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



Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	992,564	1,102,805	1,190,546	1,576,057	1,639,833	449,287	38%	1,223,809	34%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	-	-	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	276,081	731,170	285,142	330,753	347,291	62,149	22%	446,001	-22%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	276,081	731,170	285,142	330,753	347,291	62,149	22%	446,001	-22%
Total Revenue	1,268,645	1,833,975	1,475,688	1,906,810	1,987,124	511,436	35%	1,669,810	19%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	165,839	257,918	466,977	266,977	480,326	13,349	3%	230,245	109%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	165,839	257,918	466,977	266,977	480,326	13,349	3%	230,245	109%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	38,239	-	40,151	1,912	5%	-	-
Contingency	-	-	970,472	-	1,466,647	496,175	51%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	165,839	257,918	1,475,688	266,977	1,987,124	511,436	35%	230,245	763%
Revenues Less Expenses	1,102,805	1,576,058	-	1,639,833	-	-	-	1,439,565	-

Notes:
None.



	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	682,466	746,852	582,876	792,846	606,013	23,137	4%	740,722	-18%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	79,241	83,619	76,244	85,506	80,611	4,367	6%	82,788	-3%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	83,061	94,097	79,432	109,607	100,502	21,070	27%	95,588	5%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	162,302	177,716	155,676	195,113	181,113	25,437	16%	178,377	2%
Total Revenue	844,768	924,568	738,552	987,959	787,126	48,574	7%	919,098	-14%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	97,916	131,722	219,594	381,946	476,119	256,525	117%	203,861	134%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	97,916	131,722	219,594	381,946	476,119	256,525	117%	203,861	134%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	518,958	-	311,007	(207,951)	-40%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	97,916	131,722	738,552	381,946	787,126	48,574	7%	203,861	286%
Revenues Less Expenses	746,852	792,845	-	606,013	-	-	-	715,237	-

Notes:
None.



160406-Deferred Compensation
 BCC Priority Alignment: Accountable Government

Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	2,082	2,082	3,882	1,682	3,971	89	2%	1,949	104%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	-	-	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	3,946	3,000	3,000	-	1,315	128%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	-	-	-	3,946	3,000	3,000	-	1,315	128%
Total Revenue	2,082	2,082	3,882	5,628	6,971	3,089	80%	3,264	114%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	-	400	1,800	1,657	6,150	4,350	242%	686	797%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	-	400	1,800	1,657	6,150	4,350	242%	686	797%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	2,082	-	821	(1,261)	-61%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	-	400	3,882	1,657	6,971	3,089	80%	686	917%
Revenues Less Expenses	2,082	1,682	-	3,971	-	-	-	2,578	-

Notes:
 None.



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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 04/29/24	FY 24-25 Target
Result	Clackamas County will maintain a workers' compensation rating below the state's industry average. ¹	74%	77%	100%	n/a**	100%
Results	Maintain Clackamas County's ratio of actual liability claims losses paid to the actuarial estimate at 1 or below. ¹	0.60	0.8	1	n/a**	1
Result	By 2025, all classification specifications will contain risk management responsibilities. ¹	0%	100%	100%	n/a**	100%
Result	By 2025, departments will have access to real time risk management data (examples: injury trends, claim expenses).	100%	100%	100%	n/a**	100%
Output	Number of ergonomic assessments provided quarterly	63	40	100	n/a**	100
Output	Number of liability claims.	96	86	120	83	120
Output	Number of workers' compensation claims processed quarterly	120	73	120	n/a**	30
Output	Number of driving checks ¹	497	278	400	n/a**	400
Output	Number of unemployment claims.	193	68	120	n/a**	150

**=Unable to collect data

Performance Measures Narrative:

***Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we do.

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 costs of injuries and future chances of risk. One (1) is the 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



Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	383,111	81,138	-	54,468	-	-	-	172,906	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	9,112	-	-	-	-	-	-	3,037	-100%
Charges, Fees, License, Permits, Fines	1,228,659	1,610,327	1,719,025	1,692,355	1,932,140	213,115	12%	1,510,447	28%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	1,237,771	1,610,327	1,719,025	1,692,355	1,932,140	213,115	12%	1,513,484	28%
Total Revenue	1,620,882	1,691,465	1,719,025	1,746,823	1,932,140	213,115	12%	1,686,390	15%
Personnel Services	1,306,602	1,403,452	1,496,142	1,532,390	1,660,339	164,197	11%	1,414,148	17%
Materials and Services	233,142	233,545	222,883	214,433	268,732	45,849	21%	227,040	18%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	1,539,744	1,636,997	1,719,025	1,746,823	1,929,072	210,046	12%	1,641,188	18%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	3,068	3,068	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	1,539,744	1,636,997	1,719,025	1,746,823	1,932,140	213,114	12%	1,641,188	18%
Revenues Less Expenses	81,138	54,468	-	-	-	-	-	45,202	

Notes:
 The administration program for Risk & Safety that contains the salaries, fringe, software and allocation costs of Fund 761. Costs here have risen mostly in-step with economic inflation. .



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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 03/31/23	FY 24-25 Target
Output	Number of liability claims.	96	86	120	83	120
Results	Maintain Clackamas County's ratio of actual liability claims losses paid to the actuarial estimate at 1 or below. ¹	0.60	0.8	1	n/a**	1

**=Unable to collect data

Performance Measures Narrative:

***Note-HR program areas are in the process of realigning our performance measures to accurately reflect the work we do.

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

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	10,053,303	9,772,288	9,001,994	9,268,933	8,609,641	(392,353)	-4%	9,698,175	-11%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	2,087,482	1,680,092	2,034,769	1,973,648	2,253,417	218,648	11%	1,913,741	18%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	36,740	200,183	50,000	100,000	100,000	50,000	100%	112,308	-11%
Other Interfund Transfers	-	-	-	-	1,000,000	1,000,000	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	2,124,222	1,880,275	2,084,769	2,073,648	3,353,417	1,268,648	61%	2,026,048	66%
Total Revenue	12,177,524	11,652,563	11,086,763	11,342,581	11,963,058	876,295	8%	11,724,223	2%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	2,405,236	2,383,630	2,502,500	2,732,940	2,833,500	331,000	13%	2,507,269	13%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	2,405,236	2,383,630	2,502,500	2,732,940	2,833,500	331,000	13%	2,507,269	13%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	2,669,000	-	2,670,000	1,000	0%	-	-
Contingency	-	-	5,915,263	-	6,459,558	544,295	9%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	2,405,236	2,383,630	11,086,763	2,732,940	11,963,058	876,295	8%	2,507,269	377%
Revenues Less Expenses	9,772,288	9,268,934	-	8,609,641	-	-	-	9,216,954	-

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 21-22 Actuals	FY 22-23 Actuals	FY 23-24 Target	FY 23-24 Actuals as of 4/29/24	FY 24-25 Target
Result	Clackamas County will maintain a workers' compensation rating below the state's industry average. ¹	74%	77%	100%	n/a**	100%
Output	Number of workers' compensation claims processed quarterly	120	73	120	101	30

**=Unable to collect data

Performance Measures Narrative:

HR program areas are in the process of realigning our performance measures to accurately reflect the work we are do.

***Note-

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



160503-Workers' Compensation
BCC Priority Alignment: Accountable Government

Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	2,207,713	2,115,836	2,005,455	1,795,549	1,893,924	(111,531)	-6%	2,039,699	-7%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	1,593,038	1,637,614	1,896,584	1,984,375	1,464,443	(432,141)	-23%	1,738,342	-16%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	1,000,000	1,000,000	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	1,593,038	1,637,614	1,896,584	1,984,375	2,464,443	567,859	30%	1,738,342	42%
Total Revenue	3,800,751	3,753,450	3,902,039	3,779,924	4,358,367	456,328	12%	3,778,042	15%
Personnel Services	18,725	(20,760)	-	-	-	-	-	(678)	-100%
Materials and Services	1,666,190	1,978,661	1,861,000	1,886,000	1,956,000	95,000	5%	1,843,617	6%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	1,684,915	1,957,901	1,861,000	1,886,000	1,956,000	95,000	5%	1,842,939	6%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	1,000,000	-	1,000,000	-	0%	-	-
Contingency	-	-	1,041,039	-	1,402,367	361,328	35%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	1,684,915	1,957,901	3,902,039	1,886,000	4,358,367	456,328	12%	1,842,939	136%
Revenues Less Expenses	2,115,836	1,795,549	-	1,893,924	-	-	-	1,935,103	-

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.



160504-Unemployment
 BCC Priority Alignment: Accountable Government
 Budget Summary

	FY21-22 Actuals	FY22-23 Actuals	FY23-24 Amended Budget	FY23-24 Projected Year-End	FY24-25 Budget	Budget-to-Budget Changes:		3-Year Average	% Change from 3-Year Avg
						\$ FY23-24 to FY24-25	% FY23-24 to FY24-25		
Beginning Fund Balance	169,150	165,741	161,941	161,115	157,315	(4,626)	-3%	165,335	-5%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	227,269	262,804	350,000	350,000	350,000	-	0%	280,024	25%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	227,269	262,804	350,000	350,000	350,000	-	0%	280,024	25%
Total Revenue	396,419	428,545	511,941	511,115	507,315	(4,626)	-1%	445,360	14%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	230,678	267,430	353,800	353,800	353,800	-	0%	283,969	25%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	230,678	267,430	353,800	353,800	353,800	-	0%	283,969	25%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Contingency	-	-	158,141	-	153,515	(4,626)	-3%	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-	-	-
Total Expense	230,678	267,430	511,941	353,800	507,315	(4,626)	-1%	283,969	79%
Revenues Less Expenses	165,741	161,115	-	157,315	-			161,391	

Notes:
 Unemployment costs continue to be managed and paid as incurred. Departments are charged for all unemployment costs associated to their areas.