

Human Resources

FY 22-23 BUDGET PRESENTATION

2021 Major Accomplishments

AREA	DESCRIPTION
Equal Pay Analysis	<p>Classification & Compensation – Finalized comprehensive Equal Pay Analysis study of all County positions, identified gaps, and communicated specific findings and comprehensive financial impact to the Board of County Commissioners. Currently in the process of negotiating compensation gaps and a combined compensation plan, and developing revised business practices and policies in order to maintain equity achieved through the study.</p> <p>Workforce Data Management – Continued to partner with Classification and Compensation, Technology Services staff, and external consultants to implement system enhancements to monitor and maintain pay equity within the workforce.</p>
COVID Response	<p>Employee & Labor Relations - Provided leadership and guidance to County managers and supervisor throughout the course of the pandemic, advising on highly complex and sensitive employee relations matters, particularly related to implementation of the mask mandates and employee return to the workplace.</p> <p>Risk & Safety – Continued to lead the County's workplace COVID response, from risk reduction to safety management/compliance.</p> <p>Benefits – From July 1, 2021 through March 31, 2022, handled 209 new FMLA/OFLA leave requests.</p>
Employee Engagement	<p>Workforce Planning & Development - Launched second County-wide employee engagement survey in October, 2021, with a 65% employee participation rate.</p>
Equity Lens	<p>Recruitment & Selection ~ Workforce Planning & Development ~ Director's Office (Internal Complaints) – Participated in more complex multi-disciplinary discussions with staff from the Office of Equity and Inclusion, County Counsel, and Human Resources to implement collaborative new processes with greater impact to the County's equity mission.</p>
Process Improvement	<p>Benefits & Wellness – Continued comprehensive efforts toward implementation of the Benefits Service Delivery Strategy, including onboarding of a third party administrator for administering benefits.</p>

Line of Business/Program	Results Measure		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Projected Performance	FY 22-23 Target
Workforce Data Management	80% of HR Managers, HR Staff, and PA Processors reporting by survey that business and system enhancements have improved their daily operations and achieve strategic results.		n/a	97%	80%	97%	80%
Employee & Labor Relations	90% of corrective actions involving written reprimands, suspensions, demotions and employee terminations will have been vetted with E&LR before imposition.		n/a	100%	90%	100%	90%
Classification & Compensation	By 2025, 100% of County classifications will have been reviewed for alignment with County business needs and market comparability within the past five years, and year over year thereafter.		20%	31%	20%	26%	35%
Recruitment & Selection	70% of open positions are filled within 90 days from the date of requisition.		38%	49%	70%	51%	70%
Workforce Planning & Development	90% of Learning & Development participants “agree” or “strongly agree” that Learning & Development events were a valuable investment of their time.		95%	92%	90%	88.5%	90%
Benefits & Wellness	90% of supervisor and manager survey responses indicate "agree or "strongly agree" they have timely and accurate information about their employees' protected leaves and disability.		n/a	n/a	90%	70%	90%
Risk & Safety	Clackamas County will maintain a workers' compensation rating below the state's industry average.		0.71	0.71	1	0.74	1

Program Profiles: FY 22-23 Summary

Line of Business	Program	Total Funds	% County General Funds	% Restricted Funds	Mandate: Fed/State/Cty /IGA/None	% Program Operated by County	Metrics: % Target Meet/Exceed or Improve
Administration	Office of the Director/Administration	\$895,217	100%	76% Allocations paid by County departments — 24% General Fund Support	Wide range of federal and state employment laws governing us as a public employer, as well as eight collective bargaining agreements, and various employment policies	100%	50%
Administration	Workforce Data Management	\$916,554	100%			100%	50%
Employee & Labor Relations	Employee & Labor Relations	\$821,721	100%			100%	50%
Workforce Design	Classification & Compensation	\$1,079,313	100%			100%	33%
Workforce Design	Recruitment & Selection	\$1,143,961	100%			100%	100%
Workforce Design	Workforce Planning & Design	\$ 650,619	100%			100%	33%
Benefits & Wellness	Benefits & Wellness	\$59,416,372	0%	15%		80%	33%
Risk & Safety	Risk & Safety	\$17,989,464	0%	46%		90%	66%



Department Summary by Fund

Human Resources Department (16)

Department Budget Summary by Fund

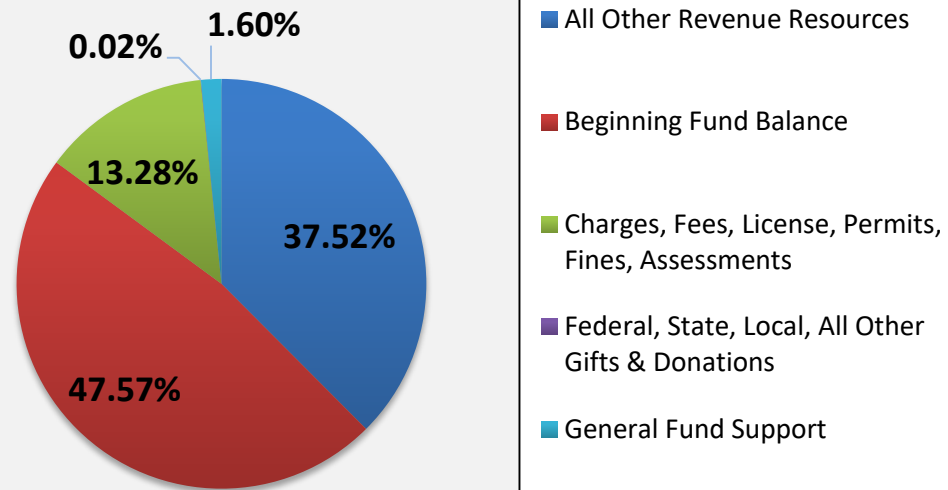
Line of Business		FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23
			General Fund	Self-Insurance Fund	Risk Mgmt Claims Fund	ARPA Fund	Total Budget	General Fund Support in Budget**
Program	Prog#	FTE	(100)	(760)	(761)	(230)*		
Administration								
Director's Office/Administrative Services	160101	4.0	895,217	-	-	-	895,217	221,512
Workforce Data Management	160102	4.5	896,554	-	-	20,000	916,554	221,512
Employee & Labor Relations Management								
Employee and Labor Relations	160202	3.5	821,721	-	-	-	821,721	221,512
Workforce Design								
Classification and Compensation	160302	5.0	1,079,313	-	-	-	1,079,313	221,512
Recruitment and Selection	160303	6.0	1,143,961	-	-	-	1,143,961	221,512
Workforce Development and Planning	160304	2.0	650,619	-	-	-	650,619	221,512
Benefits, Wellness, Leave Management								
Benefits Administration	160401	11.3	-	3,845,095	-	-	3,845,095	-
Medical Insurance	160402	-	-	48,949,901	-	-	48,949,901	-
Dental Insurance	160403	-	-	4,337,587	-	-	4,337,587	-
Disability Insurance	160404	-	-	1,457,523	-	-	1,457,523	-
Employee Assistance Program/Wellness	160405	-	-	820,584	-	-	820,584	-
Deferred Compensation	160406	-	-	5,682	-	-	5,682	-
Risk & Safety Management								
Risk Administration	160501	7.8	-	-	1,725,561	-	1,725,561	-
Casualty/Liability	160502	-	-	-	12,277,538	-	12,277,538	-
Workers' Compensation	160503	-	-	-	3,621,015	-	3,621,015	-
Unemployment	160504	-	-	-	365,350	-	365,350	-
TOTAL		44.0	5,487,385	59,416,372	17,989,464	20,000	82,913,221	1,329,072
FY 21/22 Budget		44.0	5,217,501	53,015,083	18,193,804	123,506	76,549,894	1,453,792
\$ Increase (Decrease)		0.0	269,884	6,401,289	-204,340	-103,506	6,363,327	-124,720
% Increase (Decrease)		0.0%	5.2%	12.1%	-1.1%	-83.8%	8.3%	-8.6%

* FY21-22 ARPA revenue of \$123,506 by the same amount in Personnel Services and Materials and Services expense category.

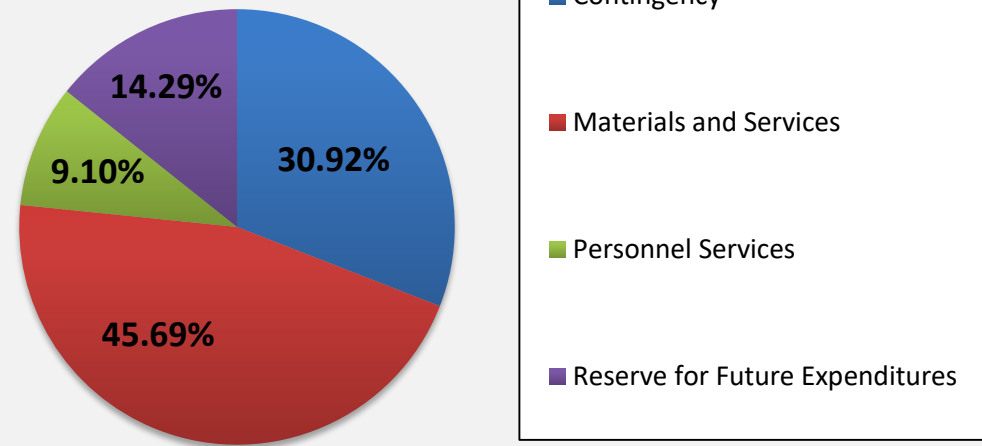
** General Fund Support is the subsidy, net of any other revenue received by the department.

FY 22-23 Revenue and Expenses

Revenues



Expenses



Summary of Revenue & Expenses

Human Resources (16)

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	24,929,389	31,144,078	31,822,731	35,606,010	39,439,579	7,616,848	24%
Federal, State, Local, All Other Gifts & Donations*	24,132	48,494	123,506	43,506	20,000	(103,506)	-84%
Charges, Fees, License, Permits, Fines, Assessments	12,588,595	10,917,779	10,855,660	10,596,195	11,011,785	156,125	1%
All Other Revenues Resources	30,587,820	32,812,431	32,294,201	29,788,600	31,112,785	(1,181,416)	-4%
General Fund Support	517,644	858,459	1,453,792	1,453,792	1,329,072	(124,720)	-9%
Operating Revenue	43,718,191	44,637,163	44,727,159	41,882,093	43,473,642	(1,253,517)	-3%
Total Revenue	68,647,580	75,781,241	76,549,890	77,488,103	82,913,221	6,363,331	8%
Personnel Services*	6,188,268	6,731,027	7,309,613	6,921,415	7,545,157	235,544	3%
Materials and Services	31,315,233	32,444,205	42,812,689	31,127,109	37,884,038	(4,928,651)	-12%
Operating Expenditure	37,503,501	39,175,232	50,122,302	38,048,524	45,429,195	(4,693,107)	-9%
Transfers		1,000,000				-	-
Reserve for Future Expenditures			10,836,652		11,845,552	1,008,900	9%
Contingency			15,590,936		25,638,474	10,047,538	64%
Total Expense	37,503,501	40,175,232	76,549,890	38,048,524	82,913,221	6,363,331	8%
Ending Fund Balance Restricted	-	-	-	39,439,579	-	-	-
Revenue Less Expense**	31,144,078	34,747,550	-	-	-	-	-
Full Time Equiv Positions (FTE) Budgeted	43.0	43.0	44.0	44.0	44.0	0.0	0%

*FY21-22 ARPA revenue of \$123,506 offset by the same amount in Personnel Services category.

**General Fund Departments: Starting in FY21-22, amounts in Revenue Less Expenses will be moved into General Fund Non-Departmental at year-end.

Summary of Revenue & Expenses

Human Resources General Fund 100-16 (including 230 ARPA)

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	103,644	-	-
Federal, State, Local, All Other Gifts & Donations*	9,241	19,111	108,183	28,183	20,000	(88,183)	-82%
Charges, Fees, License, Permits, Fines, Assessments	3,748,102	3,753,450	3,763,705	3,758,705	4,054,669	290,964	8%
General Fund Support	517,644	858,459	1,453,792	1,453,792	1,329,072	(124,720)	-9%
Operating Revenue	4,274,987	4,631,020	5,325,680	5,240,680	5,403,741	78,061	1%
Total Revenue	4,274,987	4,631,020	5,325,680	5,240,680	5,507,385	78,061	3%
Personnel Services*	3,505,671	3,798,486	4,040,946	3,951,865	4,325,024	284,078	7%
Materials and Services	769,316	832,534	1,284,734	1,185,171	1,182,361	(102,373)	-8%
Operating Expenditure	4,274,987	4,631,020	5,325,680	5,137,036	5,507,385	181,705	3%
Total Expense	4,274,987	4,631,020	5,325,680	5,137,036	5,507,385	181,705	3%
Ending Fund Balance Restricted	-	-	-	103,644	-	-	0%
Revenue Less Expense**	-	-	-	-	-	-	0%
Full Time Equiv Positions (FTE) Budgeted	23.0	23.0	25.0	25.0	25.0	-	0%

*FY21-22 Budget ARPA revenue of \$108,183 offset by the same amount in Personnel Services expense category.

**General Fund Departments: Starting in FY21-22, amounts in Revenue Less Expenses will be moved into General Fund Non-Departmental at year-end.

Summary of Revenue & Expenses

Human Resources - Self-Insurance Fund 760 -16

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	12,245,898	17,774,794	19,077,370	22,792,734	26,671,098	7,593,728	40%
Federal, State, Local, All Other Gifts & Donations*	2,563	10,592	6,211	6,211	-	(6,211)	-100%
Charges, Fees, License, Permits, Fines, Assessments	3,698,542	2,134,487	1,986,955	1,732,490	1,732,490	(254,465)	-13%
All Other Revenues Resources	30,259,815	32,485,670	31,950,758	29,671,531	31,012,785	(937,973)	-3%
Operating Revenue	33,960,920	34,630,749	33,943,924	31,410,232	32,745,275	(1,198,649)	-4%
Total Revenue	46,206,817	52,405,543	53,021,294	54,202,966	59,416,373	6,395,079	12%
Personnel Services*	1,557,973	1,529,903	1,773,295	1,642,617	1,809,208	35,913	2%
Materials and Services	26,874,051	28,082,906	37,563,001	25,889,251	32,734,179	(4,828,822)	-13%
Operating Expenditure	28,432,024	29,612,809	39,336,296	27,531,868	34,543,387	(4,792,909)	-12%
Reserve for Future Expenditures	-	-	2,476,652	-	3,003,552	526,900	21%
Contingency	-	-	11,208,346	-	21,869,434	10,661,088	95%
Total Expenditure	28,432,024	29,612,809	53,021,294	27,531,868	59,416,373	6,395,079	12%
Ending Fund Balance Restricted	-	-	-	26,671,098	-	-	-
Revenue Less Expense**	17,774,794	22,792,734	-	-	-	-	-
Full Time Equiv Positions (FTE) Budgeted	11.3	11.3	11.3	11.3	11.3	-	0%

*FY21-22 ARPA revenue of \$6,211 offset by same amount in Personnel Services expense category.

**General Fund Departments: Starting in FY21-22, amounts in Revenue Less Expenses will be moved into General Fund Non-Departmental at year-end.

Summary of Revenue & Expenses

Human Resources - Risk Management Fund 761-16

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	12,683,491	13,369,285	12,745,361	12,813,277	12,664,838	(80,523)	-1%
Federal, State, Local, All Other Gifts & Donations*	12,328	18,792	9,112	9,112	-	(9,112)	-100%
Charges, Fees, License, Permits, Fines, Assessments	5,141,952	5,029,842	5,105,000	5,105,000	5,224,626	119,626	2%
All Other Revenues Resources	328,005	326,761	343,443	117,069	100,000	(243,443)	-71%
Operating Revenue	5,482,285	5,375,395	5,457,555	5,231,181	5,324,626	(132,929)	-2%
Total Revenue	18,165,776	18,744,680	18,202,916	18,044,458	17,989,464	(213,452)	-1%
Personnel Services*	1,124,624	1,402,639	1,495,376	1,326,933	1,410,925	(84,451)	-6%
Materials and Services	3,671,866	3,528,764	3,964,950	4,052,687	3,967,499	2,549	0%
Operating Expenditure	4,796,490	4,931,403	5,460,326	5,379,620	5,378,424	(81,902)	-1%
Transfers	-	1,000,000	-	-	-	-	-
Reserve for Future Expenditures	-	-	8,360,000	-	8,842,000	482,000	6%
Contingency	-	-	4,382,590	-	3,769,040	(613,550)	-14%
Total Expense	4,796,490	5,931,403	18,202,916	5,379,620	17,989,464	(213,452)	-1%
Ending Fund Balance Restricted	-	-	-	12,664,838	-	-	-
Revenue Less Expense**	13,369,286	12,813,277	-	-	-	-	-
Full Time Equiv Positions (FTE) Budgeted	8.8	8.8	7.8	7.8	7.8	0.0	0%

*FY21-22 ARPA revenue of \$9,112 offset by same amount in Personnel Services expense category.

**General Fund Departments: Starting in FY21-22, amounts in Revenue Less Expenses will be moved into General Fund Non-Departmental at year-end.

Significant Policy and/or Financial Issues

DESCRIPTION	IMPACT
<p>Oregon Equal Pay Act Compliance</p> <p>Critical next step to develop and implement new business practices and technological system enhancements to monitor and maintain pay equity within the workforce.</p>	<p>Significant financial and workload impact to the Classification and Compensation, Recruitment, and Workforce Data Management programs to implement system enhancements so the County is in compliance with the Equal Pay Act; lack of compliance with the Equal Pay Act will result in financial penalties to the organization.</p>
<p>Workforce Management</p> <p>County departments are struggling to provide the services they deliver to the public, causing a ripple effect on the demands for Human Resources services.</p> <p>Responding to these demands, while maintaining an engaged and productive workforce during times of organizational stress, requires innovative, collaborative, and integrated problem-solving strategies, particularly among the following HR program areas:</p> <ul style="list-style-type: none"> • Recruitment and Selection • Employee and Labor Relations • Workforce Planning and Development 	<p>Demand for recruitments (including recruitment backlog) is at an all-time high, resulting in the need to update recruitment-related business processes, policies, and staffing models to address this critical County need.</p> <p>The Employee & Labor Relations team has a deep understanding the County organization and continue to provide guidance to all levels of the organization to navigate the complex landscape of labor issues and employment laws. County employment related policies are being updated to ensure compliance with recent changes federal and state employment laws.</p> <p>The Workforce Planning and Development team is leading the charge to develop a new paradigm of a learning culture in a hybrid environment, where development is employee-centric and more reliant on technology. This effort requires that managers are well-equipped to support staff and lead teams in a time of ongoing change and uncertainty.</p>
<p>Operational Efficiency</p> <p>Greater demand for services and limited resources continue to drive the need for HR to gain efficiencies and rethink the way we do business. The Benefits Administration and Workforce Data Management teams will drive these initiatives in the coming year.</p>	<p>Completion of the Benefits Transformation Initiative will move the County from transactional benefits administration to strategically managed benefits delivery, resulting in greater access for employees and plan participants.</p> <p>Workforce Data Management continues to provide business process and technological solutions to for all areas of HR, requiring a significant level of partnership with Technology Services and external consultants to meet the demand and create efficiencies.</p>

End of Presentation

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CLACKAMAS
COUNTY



Human Resources Department (16)

Department Budget Summary by Fund

Line of Business		FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23
Program	Prog#	FTE	General Fund (100)	Self-Insurance Fund (760)	Risk Mgmt Claims Fund (761)	ARPA Fund (230)*	Total Budget	General Fund Support in Budget**
Administration								
Director's Office/Administrative Services	160101	4.0	895,217	-	-	-	895,217	221,512
Workforce Data Management	160102	4.5	896,554	-	-	20,000	916,554	221,512
Employee & Labor Relations Management								
Employee and Labor Relations	160202	3.5	821,721	-	-	-	821,721	221,512
Workforce Design								
Classification and Compensation	160302	5.0	1,079,313	-	-	-	1,079,313	221,512
Recruitment and Selection	160303	6.0	1,143,961	-	-	-	1,143,961	221,512
Workforce Development and Planning	160304	2.0	650,619	-	-	-	650,619	221,512
Benefits, Wellness, Leave Management								
Benefits Administration	160401	11.3	-	3,845,095	-	-	3,845,095	-
Medical Insurance	160402	-	-	48,949,901	-	-	48,949,901	-
Dental Insurance	160403	-	-	4,337,587	-	-	4,337,587	-
Disability Insurance	160404	-	-	1,457,523	-	-	1,457,523	-
Employee Assistance Program/Wellness	160405	-	-	820,584	-	-	820,584	-
Deferred Compensation	160406	-	-	5,682	-	-	5,682	-
Risk & Safety Management								
Risk Administration	160501	7.8	-	-	1,725,561	-	1,725,561	-
Casualty/Liability	160502	-	-	-	12,277,538	-	12,277,538	-
Workers' Compensation	160503	-	-	-	3,621,015	-	3,621,015	-
Unemployment	160504	-	-	-	365,350	-	365,350	-
TOTAL		44.0	5,487,385	59,416,372	17,989,464	20,000	82,913,221	1,329,072
FY 21/22 Budget								
		44.0	5,217,501	53,015,083	18,193,804	123,506	76,549,894	1,453,792
\$ Increase (Decrease)								
		0.0	269,884	6,401,289	-204,340	-103,506	6,363,327	-124,720
% Increase (Decrease)								
		0.0%	5.2%	12.1%	-1.1%	-83.8%	8.3%	-8.6%

* FY21-22 ARPA revenue of \$123,506 by the same amount in Personnel Services and Materials and Services expense category.

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



Department of Human Resources (16)

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 (16)				
Evelyn Minor-Lawrence, Director FTE 44.0 Total Budget \$82,913,221 General Fund Support \$ 1,329,072				
Administration Evelyn Minor-Lawrence, Director Total Budget \$1,811,771 Gen Fund \$ 443,024	Employee & Labor Relations Eric Sarha, Deputy Director/Chief Negotiator Total Budget \$821,721 Gen Fund \$ 221,512	Workforce Design Evelyn Minor-Lawrence, Director Total Budget \$2,873,893 Gen Fund \$ 664,536	Benefits, Wellness, Leave Management Kristi Durham, Benefits Manager Total Budget \$59,416,372 Gen Fund \$ -	Risk & Safety Management Eric Machado, Risk Manager Total Budget \$17,989,464 Gen Fund \$ -
Office of the Director/ Administrative Svcs Evelyn Minor-Lawrence, Director FTE 6.0 Total Budget \$895,217 Gen Fund \$ 221,512	Employee & Labor Relations Eric Sarha, Assistant Director/Chief Negotiator FTE 4.0 Total Budget \$821,721 Gen Fund \$ 221,512	Classification & Compensation Heather Pedersen, Class & Comp Manager FTE 6.0 Total Budget \$1,079,313 Gen Fund \$ 221,512	Benefits Administration Kristi Durham, Benefits Manager FTE 8.0 Total Budget \$3,845,095 Gen Fund \$ -	Risk Administration Eric Machado, Risk Manager FTE 6.0 Total Budget \$1,725,561 Gen Fund \$ -
Workforce Data Management Le Huynh, HR Business Systems Manager FTE 6.0 Total Budget \$916,554 Gen Fund \$ 221,512		Recruitment and Selection Jared Haddock, Recruitment Manager FTE 6.0 Total Budget \$1,143,961 Gen Fund \$ 221,512	Medical Insurance Kristi Durham, Benefits Manager Total Budget \$48,949,901 Gen Fund \$ -	Casualty/Liability Eric Machado, Risk Manager Total Budget \$12,277,538 Gen Fund \$ -
		Workforce Development & Planning Kim Lignore, Learning & Development Manager FTE 2.0 Total Budget \$650,619 Gen Fund \$ 221,512	Dental Insurance Kristi Durham, Benefits Manager Total Budget \$4,337,587 Gen Fund \$ -	Workers' Compensation Eric Machado, Risk Manager Total Budget \$3,621,015 Gen Fund \$ -
			Disability Insurance Kristi Durham, Benefits Manager Total Budget \$1,457,523 Gen Fund \$ -	Unemployment Eric Machado, Risk Manager Total Budget \$365,350 Gen Fund \$ -
			EAP/Wellness Kristi Durham, Benefits Manager Total Budget \$820,584 Gen Fund \$ -	
			Deferred Compensation Kristi Durham, Benefits Manager Total Budget \$5,682 Gen Fund \$ -	

* 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 budgetary within the department.



Purpose Statement

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

Performance Narrative Statement

Major Initiatives:

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

Employee Policy and Practices (EPP)/County Code Integration

During the fall of 2020 we conducted a Request for Proposal process through the Procurement Division to retain the services of a firm specializing in development of employment policies. The selected firm began their engagement in January, 2021, and have already made significant progress on many County employment policies. During the course of calendar year 2021, feedback from the County's Policy Committee prompted us to revisit a number of policies that were under revision to ensure the formatting edits were in line with the County's overall policy direction. To date, our team of consultants and internal staff subject matter experts have made significant edits to 25 Employment Policy and Practices (EPPs). Once edits are complete, next steps in the review process includes County Counsel, the Policy Committee, and County Administration or the Board of County Commissioners.

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 22/23.

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result	By 2021, 90% of Clackamas County managers agree or strongly agree that Human Resources is a strategic business partner.	90%	91%	90%	72%	90%
Result	80% of HR Lines of Business managers who report they "strongly agree" or "agree" that Administrative Services helps their line of business to achieve results, is efficient and timely in response, and is proactive in solving problems.	100%	100%	80%	100%	90%
Output	Number of revised Employee Policies and Procedures and County Code.	0	3	12	3	18
Output (NEW)	Number of Internal Complaints investigated per fiscal year.	n/a	13	10	3	10
Output (NEW)	By 2025 all Employment Policies and Practices will be current and reviewed every three years thereafter.	n/a	5%	20%	5%	17%

Performance Measures Narrative:

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.

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

While we only reported three true internal complaint investigations through December 31, 2021, we have seen a significant increase in complaints during January and February of 2022, and expect to report a number close to the target of 10, despite continued remote work arrangements for many employees.

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



Administration

Office of the Director/Administrative Services

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	43,866	43,866	-
Federal, State, Local, All Other Gifts & Donations	9,241	19,111	8,183	8,183	-	(8,183)	-100%
Charges, Fees, License, Permits, Fines, Assessments	3,748,102	3,753,450	735,843	730,843	629,839	(106,004)	-14%
General Fund Support	517,644	858,460	212,498	212,498	221,512	9,014	4%
Operating Revenue	4,274,987	4,631,021	956,524	951,524	851,351	(105,173)	-11%
Total Revenue	4,274,987	4,631,021	956,524	951,524	895,217	(61,307)	-6%
Personnel Services	3,505,671	3,798,486	594,236	581,236	622,694	28,458	5%
Materials & Services	769,316	832,535	362,288	326,422	272,523	(89,765)	-25%
Operating Expense	4,274,987	4,631,021	956,524	907,658	895,217	(61,307)	-6%
Total Expense	4,274,987	4,631,021	956,524	907,658	895,217	(61,307)	-6%
Ending Fund Balance - Restricted				43,866			
Revenues Less Expenses	-	-	-	-	-	-	

Significant Issues and Changes



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:

Provide support to Classification and Compensation with the technology implementation of Oregon's Equal Pay Act. This included developing the tools within PeopleSoft to maintain classifications factors and to run Work of Comparable Character to group classifications. Create reports and provide guidance on data analysis of employee salary. WDM continues to collaborate with both Classification and Compensation team as well as Recruitment and Selections team to develop and streamline processes for equitable salary placement analysis for new hires and internal transfers.

Upcoming Initiatives (For FY 22-23)

Continue to collaborate with C&C and R&S to have the technology in place to automate salary placement analysis, leverage technology to adapt processes to become more agile and streamline. WDM will work on enhancing the equal pay analysis and other reports for C&C to use ensure compliance and equitable salary for all employees. Additionally, the WDM unit will work with Classifications & Compensations and Workforce Planning & Development to assist with the technology solution for the Pay for Performance system.

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result	95% of departments submitting Personnel Actions not needing material corrections.	95%	94%	95%	94% ¹	95%
Result (NEW)	80% of HR Managers, HR Staff, and PA Processors reporting by survey that business and system enhancements have improved their daily operations and achieve strategic results.	n/a	97%	80%	97% ¹	80%
Output	Number of data transactions provided	9,000	9236 ²	9,000	5115 ²	9,000
Output (NEW)	Number of Employee Self Service password resets.	n/a	1,478	400	652	400
Output (NEW)	Number of HR system enhancements.	n/a	13	10 ³	10	10 ³
Output (NEW)	Number of HR business process improvements.	n/a	4	10 ³	9	10 ³
Output	Number of Managers and staff trained (removed)	60	Discontinued	n/a	n/a	n/a

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

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

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

¹ Calendar year data 2021. 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 Q2.

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 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	16,812	16,812	-98%
Federal, State, Local, All Other Gifts & Donations	-	-	100,000	20,000	20,000	20,000	-98%
Charges, Fees, License, Permits, Fines, Assessments	-	-	602,943	602,943	658,230	55,287	-
General Fund Support	-	-	217,499	217,499	221,512	4,013	-
Operating Revenue	-	-	920,442	840,442	899,742	79,300	-
Total Revenue	-	-	920,442	840,442	916,554	96,112	-0.4%
Personnel Services	-	-	758,652	663,774	777,305	18,653	2%
Materials & Services	-	-	161,790	159,856	139,249	(22,541)	-14%
Operating Expense	-	-	920,442	823,630	916,554	(3,888)	-0.4%
Total Expense	-	-	920,442	823,630	916,554	(3,888)	-0.4%
Ending Fund Balance - Restricted				16,812			
Revenues Less Expenses	-	-	-	-	-	-	

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 corrective action consultation, administration of collective bargaining and labor contract services to the BCC, County Administration, and Departments so they can manage a productive workforce and maintain effective labor relations.

Performance Narrative Statement

Major Initiatives:

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

The County is presently in negotiations with the Employees' Association for their three (3) contracts (Main, Part-time/Temporary and Housing Authority) ending June 30 2021, as well as with the American Federation of State County and Municipal Employees (AFSCME) for their three (3) contracts (WES, DTD and CCOM) also ending June 30, 2021, and with the Federation of Parole and Probation Officers (FOPPO) for their contract ending on June 30, 2022. Negotiations are slated to begin with the Peace Officers Association (POA) in early 2023 for their contract ending on June 30, 2023. We will also begin to bargain with the various unions the implementation of the County's findings related to the Equal Pay Audit.

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result (NEW)	90% of corrective actions involving written reprimands, suspensions, demotions and employee terminations will have been vetted with E&LR before imposition.	n/a	100%	90%	100%	90%
Result (NEW)	90% of managers/supervisors/will have E&LR training biannually.	n/a	0%	90%	15%	90%
Output	Number of collective bargaining agreements and/or other labor agreements negotiated to resolution.	7	16	6	2	5
Output (NEW)	Number of managers and supervisors completing employee/labor relations training courses.	n/a	0	171	26	171
Output (NEW)	Number of corrective actions involving written reprimand and above vetted with E&LR before imposing.	n/a	9	28	13	20
Result	80% of grievances resolved prior to arbitration	65%	Discontinue	n/a	n/a	
Output	Number of disciplinary actions involving economic loss	18	Discontinue	n/a	n/a	
Output	Number of implemented performance improvement plans, work plans and/or other similar performance management related tools	n/a	n/a	n/a	n/a	

Performance Measures Narrative:

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, as seen in our first measure above.

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. The pandemic was also a considerable factor in the large number of labor agreements negotiated during this fiscal year. 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 is taking strides to rework curriculum for virtual delivery and looks forward to providing more training in both a virtual and in person setting in the upcoming fiscal year.

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

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

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

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



Employee and Labor Relations

Employee and Labor Relations

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	10,000	10,000	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	590,625	590,625	590,209	(416)	-0.1%
General Fund Support	-	-	297,292	297,292	221,512	(75,780)	-25%
Operating Revenue	-	-	887,917	887,917	811,721	(76,196)	-9%
Total Revenue	-	-	887,917	887,917	821,721	(66,196)	-7%
Personnel Services	-	-	683,627	683,627	636,786	(46,841)	-7%
Materials & Services	-	-	204,290	194,290	184,935	(19,355)	-9%
Operating Expense	-	-	887,917	877,917	821,721	(66,196)	-7%
Total Expense	-	-	887,917	877,917	821,721	(66,196)	-7%
Ending Fund Balance - Restricted				10,000			
Revenues Less Expenses	-	-	-	-	-	-	
Significant Issues and Changes							



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.

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. In March 2021 the consultant's preliminary recommendations were presented to the County Administrator and the Board of County Commissioners.

Since March 2021, Classification & Compensation has been working with a new consultant to review the original consultant's methodology, findings and recommended modifications to County compensation structures, systems, policies. Classification & Compensation has worked with Workforce Data Management and Technology Services to establish a pay equity analysis framework and internal tool to automate part of the equal pay analysis process and have created a system to equitably determine starting pay for new hires and employees moving between classifications. Classification & Compensation is also in the process of revising and/or establishing pay practices and policies to eliminate the potential for pay equity issues moving forward.

Structured Classification Reviews

Clackamas County has around 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. In 2020, Classification & Compensation worked with a consultant, Recruitment & Selection staff and the Office of Equity & Inclusion to determine and assign Experience Minimum Qualifications for all classifications. In 2021, the County implemented these Minimum Qualification Experience requirements County-wide in order to create a consistent baseline when recruiting for positions within the same classification, regardless of department or division.

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 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%	31%	20%	26%	35%
Result (NEW)	By 2025, County Departments will have access to tools and data necessary to support hiring decisions. ¹	n/a	20%	50%	20%	75%
Result (NEW)	By 2025, (full) implementation of Equal Pay Analysis recommendations under the direction of the Board of County Commissioners and the County Administrator.	n/a	n/a	25%	0%	50%
Output	Number of position allocations, recommendations and determinations provided.	250	321	300	185	250
Output	Number of market studies conducted (individual classifications and job families).	70	35	100	27	75
Output (NEW)	Number of new or revised classification specifications.	n/a	41	24	5	75
Output (NEW)	Number of Equal Pay Analysis recommendations. ²	n/a	265	795	459	700

Performance Measures Narrative:

New Classification and Compensation measures established/revised effective July 1, 2020. We continue to work toward our goal of ensuring that all County classifications have been reviewed and are market competitive. We expect the number of position allocations and Salary Placement Approvals (Equal Pay Analysis recommendations) to level off as the volume of COVID-related hires declines.

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



Workforce Design

Classification and Compensation

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Charges, Fees, License, Permits, Fines, Assessments	-	-	661,394	661,394	857,801	196,407	30%
General Fund Support	-	-	291,504	291,504	221,512	(69,992)	-24%
Operating Revenue	-	-	952,898	952,898	1,079,313	126,415	13%
Total Revenue	-	-	952,899	952,898	1,079,313	126,415	13%
Personnel Services	-	-	790,109	808,908	915,877	125,768	16%
Materials & Services	-	-	162,790	143,990	163,436	646	0.4%
Operating Expense	-	-	952,899	952,898	1,079,313	126,415	13%
Total Expense	-	-	952,899	952,898	1,079,313	126,415	13%
Revenues Less Expenses	-	-	-	-	-	-	
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

Major Initiatives:

Provide support to Classification and Compensation in the implementation of the Equal Pay Act. 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 creating job postings and establishing salary placements.

In partnership with the Office of Equity and Inclusion, identifying and implementing top recruitment and selection related EDI priorities.

Upcoming Initiatives (FY 22-23)

Continue to partner and support Classification and Compensation team in the implementation of the Equal Pay Act. Start to review business processes to adapt processes to become more agile and streamline. This includes looking at implementing a resume parsing tool which will help to reduce the time it takes to apply for a job while ensure the County has all necessary information from candidates to make selection decisions. Processes need to be more automated and less manual. The team will be looking at ways to make enhancements that focus on applicant improvement, hiring manager improvement, and HR process improvement.

Continue to partner with Office of Equity and Inclusion to enhance and adapt recruitment and selection process to be more inclusive. Establish priorities for recruitment and selection that are focused on EDI.

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals 7/1/21 - 12/31/21	FY 22-23 Target
Result	70% of open positions are filled within 90 days from the date of requisition	38%	49%	70%	51%	70%
Output	Number of hires per year	259	267	320	209	250
Output	Number of job postings (recruitments) per year	211	201	260	214	260
Output	Number of recruitment outreach events per year	18	18	24	3	10

Performance Measures Narrative:

The target is no longer realistic for the reasons listed below regarding the FY Actuals. This target will continue to be tracked but not set a new target at this time since we continue to evaluate and make changes to our business procedures and process. We plan to identify a new result based on business changes by FY 2023 -24. In addition, we plan to look at output results during this time period as well to determine if there are new outputs that should be added or adjusted

A note regarding the "FY 21-22 Actuals as of 12/31/21". The most significant influence on these results for this time period is the effects of the COVID-19 pandemic. As a result of the pandemic, many areas in the county have received funding to hire positions related to specific needs such as H3S. This has resulted in an increase in recruitments. Further, it has become apparent on a national level that organizations are struggling with workforce and staffing challenges as a result of the pandemic. It has become harder to attract and retain qualified diverse candidates. The number of hires per year reflects the challenges we have faced. While the number of job postings per year has increased, this number truly reflects job postings completed/closed. As mentioned above, additional outputs will be looked at in the future to have a better understanding of our recruitment activity throughout the year. As business processes are updated and changed, the outputs will be updated and adjusted as well to align with changes made.

A note regarding the "FY 20-21 Actuals as of 12/31/20". The most significant influences to this result for this time period include: 1) additional staff time required to review policies and procedures to ensure compliance with the EPA (including but not limited to implementing standardized minimum qualifications in job postings and developing a salary placement process for ALL hires); 2. Additionally, the Oregon wildfires caused recruitments to be delayed or paused while hiring managers shifted their focus to providing service delivery for impacted customers.

A note regarding the "FY 19-20 Actuals" drop in % of positions filled in 90 days result: in addition to the two business process changes previously described, four 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; 4) COVID-19 impacts (while we have never stopped recruiting, many recruitments were delayed or paused temporarily while most hiring managers were forced to shift their focus to daily operations to ensure customer service delivery needs were met when the state-wide shutdown forced the county to close all offices). All four of these factors negatively impacted this result.

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

Recruitment and Selection

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	5,000	5,000	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	706,076	706,076	917,449	211,373	30%
General Fund Support	-	-	217,500	217,500	221,512	4,012	2%
Operating Revenue	-	-	923,576	923,576	1,138,961	215,385	23%
Total Revenue	-	-	923,576	923,576	1,143,961	220,385	24%
Personnel Services	-	-	811,786	811,786	952,145	140,359	17%
Materials & Services	-	-	111,790	106,790	191,816	80,026	72%
Operating Expense	-	-	923,576	918,576	1,143,961	220,385	24%
Total Expense	-	-	923,576	918,576	1,143,961	220,385	24%
Ending Fund Balance - Restricted				5,000			
Revenues Less Expenses	-	-	-	-	-	-	
Significant Issues and Changes							



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:

Major Initiatives:

The Workforce Planning and Development (WPD) program supports countywide learning and development, change initiatives, leadership development and provides custom workforce planning services. The team, comprised of 2.9 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. We see an opportunity in 22/23 to update the current metrics to better reflect our program.

- **Employee Engagement:** In FY 21/22, we partnered with TalentMap to successfully launch our second County-wide employee engagement survey in November 2021. This year we intentionally moved quickly (within six weeks of survey close) to share County results and meet with each department leadership team to facilitate discussions. In Spring of 2022, all Departments will set goals and create action plans focused on identified areas of opportunity. The third survey will launch in fall of FY 23/24.

- **Performance Feedback:** The past few years have been challenging in terms of continuing progress of the County's performance feedback process, Clarify, Converse, Capture. Prior to putting this framework in place in 2018, less than 40% of employees received reviews. We saw upward movement in FY 19/20 and then a downward trend in FY 20/21 and now, FY 21/22. We can attribute this downward trend to lack of prioritization and accountability. Given the direction to move from tenure-based toward a pay for performance system, the 22/23 fiscal year brings an opportunity to re-energize this framework, invest in a system and develop an accountability structure.

- **Organizational Learning and Development:** 21/22 has been a year of just in time, short learning bites on a virtual platform. This trend will continue into the future. We renewed our contract with Proctions and enhanced our eLearning platform. We rolled out numerous compliance-based courses to support OSHA guidelines and also, to promote our focus on workplace violence prevention. We intend to use this platform to maximize new employee onboarding in 22/23. Other learning opportunities have been focused on supporting employees during a time of change, including organizational skills, project management, communications, resiliency, stress management, mental health and wellness.

- **Manager Communications and Development:** It has been a challenging few years for supervisors and managers and continues to be. Through Monthly Manager Meetings (MMM), we supported our County Administrator to enhance communications and transparency on important topics. These past few years have taught us the importance of peer to peer learning. In addition to MMMs, we created new supervisor peer groups in 21/22 and in 22/23, plan to rollout peer groups focused on leading hybrid teams. We've identified core supervisory expectations and in 22/23, plan to identify learning gaps and create a curriculum for managers. We look forward to Leadership Academy cohort #8 in 22/23 and continuing to offer learning opportunities to support all supervisors/managers.

- **Workforce Planning:** Meeting departments where they are at with Workforce Planning will continue to be a focus in FY 22/23. In addition, as we look at turnover trends and employee engagement data, data analytics will help us prepare for the future. Succession planning is going to be critical in preparing for the future.

- **Continue to partner with Equity and Inclusion Office** and support their rollout of foundational, custom learning for all employees and supervisors/managers. FY 21/22, we supported the rollout of foundational training for all supervisors and managers. Feedback has been very positive. We continue to apply an equity lens to all learning programs.

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 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.	n/a	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.	95%	92%	90%	88.5% ¹	90%
Result	90% of employees will have a documented summary of performance at least annually.	86%	61%	90%	61%	90%
Output (NEW)	Number of Workforce planning consultations.	n/a	17	n/a	15	n/a
Output	Number of County employees engaged in learning events.	2000	571	2000	2400	2400
Output (NEW)	Number of employees with a documented summary of performance each year.	n/a	1070	n/a	839	1800
Output	Number of workforce plans developed	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	85%	Discontinue	n/a	n/a	
Output	Number of employees engaging with the Leadership Academy	45	Discontinue	n/a	n/a	
Output	Number of County employees registered for formal learning events	2000	Discontinue	n/a	n/a	

Performance Measures Narrative:

We'll see volatility in number of employees registered for events depending on required annual trainings. percentage of Q1 and Q2 data

¹ Average

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 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	27,966	27,966	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	466,824	466,824	401,141	(65,683)	-14%
General Fund Support	-	-	217,499	217,499	221,512	4,013	2%
Operating Revenue	-	-	684,323	684,323	622,653	(61,670)	-9%
Total Revenue	-	-	684,323	684,323	650,619	(33,704)	-5%
Personnel Services	-	-	402,533	402,534	420,218	17,685	4%
Materials & Services	-	-	281,790	253,823	230,401	(51,389)	-18%
Operating Expense	-	-	684,323	656,357	650,619	(33,704)	-5%
Total Expense	-	-	684,323	656,357	650,619	(33,704)	-5%
Ending Fund Balance - Restricted				27,966			
Revenues Less Expenses	-	-	-	-	-	-	
Significant Issues and Changes							



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.

Developed Benefit Service Delivery Strategy:

- Identified services required, including priority and level of services
- Communication and engagement
- Performance Measures
- Recommended organizational structure
- Audit and control recommendations

In September 2021, we kicked off Phase 3 of our Benefits Service Delivery Transformation, continuing this work with an outside consultant in order to prepare to implement our service delivery strategy. A primary objective of this phase is to identify and onboard a benefits administration third-party vendor in order to move the County from transactional benefits administration to strategically managed benefits delivery. This project will continue into FY 22-23.

Phase 3 is comprised of three phase gates with clearly defined objectives 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

FY 21/22 Additional Benefits, Leave, and Wellness efforts:

- Reduced employee benefit waiting period in response to department and recruitment needs
- Redesigned ADA interactive process workflow, documents and web content to improve customer experience
- Implemented online claim filing processes with our short- and long-term disability vendor for non-occupational disabilities to expedite claims requests and provide additional online claim monitoring resources for employees.

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result (NEW)	80% of employees return to work within 90 days of initial non-occupational short-term disability.	n/a	90%	80%	90%*	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.	n/a	n/a	90%	70% ¹	90%
Result (NEW)	Annual alignment of wellness programs with workforce need.	n/a	n/a	20%	5%	20%
Output (NEW)	Number of medical leave requests.	n/a	n/a	524	182	450
Output (NEW)	Number of Wellness Program class participants.	n/a	n/a	100	26	150
Output (NEW)	Number of enrollment changes.	n/a	n/a	3960	4600	4500
Result	90% of Wellness class surveys indicate "agree" or "strongly agree" that the class contributes to well-being	97%	Discontinue	n/a	n/a	
Result	90% of Expected/Open Leave Cases in PeopleSoft HR are accurate	100%	Discontinue	n/a	n/a	
Result	80% of employees return to work within 180 days of initial non-occupational disability claim	85%	Discontinue	n/a	n/a	

Performance Measures Narrative:

By implementing the benefits service delivery strategy, 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.

* Represents FY 20-21 Actual. These results will be measured for the full fiscal year on June 30, 2022.

Wellness alignment and Benefit enrollment changes are part of the Benefit Service Delivery Strategy.

¹ Calendar year data 2021. This data is collected once a calendar year.

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 (with 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

Benefits Administration

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	1,076,135	2,883,320	2,581,810	2,896,090	2,036,817	(544,993)	-21%
Federal, State, Local, All Other Gifts & Donations	2,563	10,592	6,211	6,211	-	(6,211)	-100%
Charges, Fees, License, Permits, Fines, Assessments	3,614,381	2,046,033	1,902,955	1,655,078	1,655,078	(247,877)	-13%
All Other Revenue Resources	199,443	207,306	153,100	153,200	153,200	100	0%
Operating Revenue	3,816,387	2,263,931	2,062,266	1,814,489	1,808,278	(253,988)	-12%
Total Revenue	4,892,522	5,147,251	4,644,076	4,710,579	3,845,095	(798,981)	-17%
Personnel Services	1,557,973	1,529,903	1,773,295	1,642,617	1,809,207	35,912	2%
Materials & Services	451,229	721,257	958,667	1,031,145	1,286,082	327,415	34%
Operating Expense	2,009,202	2,251,160	2,731,962	2,673,762	3,095,289	363,327	13%
Contingency	-	-	1,912,114	-	749,806	(1,162,308)	-61%
Total Expense	2,009,202	2,251,160	4,644,076	2,673,762	3,845,095	(798,981)	-17%
Ending Fund Balance - Restricted				2,036,817			
Revenues Less Expenses	2,883,320	2,896,090	-	-	-	-	
Significant Issues and Changes							



Benefits and Wellness

Medical Insurance

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Output (NEW)	Number of enrollment changes.	n/a	n/a	3960	4600	4500

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

Medical Insurance

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	8,684,900	11,940,003	13,146,807	16,418,677	20,670,114	7,523,307	57%
All Other Revenue Resources	27,363,855	29,457,396	28,967,562	26,933,133	28,279,787	(687,775)	-2%
Operating Revenue	27,363,855	29,457,396	28,967,562	26,933,133	28,279,787	(687,775)	-2%
Total Revenue	36,048,755	41,397,399	42,114,369	43,351,810	48,949,901	6,835,532	16%
Materials & Services	24,108,752	24,978,722	33,572,643	22,681,696	28,865,632	(4,707,011)	-14%
Operating Expense	24,108,752	24,978,722	33,572,643	22,681,696	28,865,632	(4,707,011)	-14%
Reserve for Future Expenditures	-	-	2,162,700	20,670,114	2,700,000	537,300	25%
Contingency	-	-	6,379,026	-	17,384,269	11,005,243	173%
Total Expense	24,108,752	24,978,722	42,114,369	43,351,810	48,949,901	6,835,532	16%
Ending Fund Balance - Restricted				20,670,114			
Revenues Less Expenses	11,940,003	16,418,677	-	-	-	-	

Significant Issues and Changes



Benefits and Wellness

Dental Insurance

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

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



Benefits and Wellness

Dental Insurance

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	1,100,918	1,488,578	1,718,528	1,800,854	2,123,364	404,836	23.6%
All Other Revenue Resources	2,320,657	2,422,627	2,440,446	2,214,223	2,214,223	(226,223)	-9.3%
Operating Revenue	2,320,657	2,422,627	2,440,446	2,214,223	2,214,223	(226,223)	-9.3%
Total Revenue	3,421,575	3,911,205	4,158,974	4,015,077	4,337,587	178,613	4.3%
Materials & Services	1,932,997	2,110,351	2,431,706	1,891,713	2,094,868	(336,838)	-13.9%
Operating Expense	1,932,997	2,110,351	2,431,706	1,891,713	2,094,868	(336,838)	-13.9%
Reserve for Future Expenditures	-	-	255,700	-	245,300	(10,400)	-4.1%
Contingency	-	-	1,471,568	-	1,997,419	525,851	35.7%
Total Expense	1,932,997	2,110,351	4,158,974	1,891,713	4,337,587	178,613	4.3%
Ending Fund Balance - Restricted				2,123,364			
Revenues Less Expenses	1,488,578	1,800,854	-	-	-	-	
Significant Issues and Changes							



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 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result (NEW)	80% of employees return to work within 90 days of initial non-occupational short-term disability.	n/a	90%	80%	90%	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.	n/a	n/a	90%	70% ¹	90%
Output (NEW)	Number of medical leave requests.	n/a	n/a	524	182	450

¹ Calendar year data 2021. This data is collected once a calendar year.

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



Benefits and Wellness

Disability Insurance

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	770,994	833,180	973,566	992,564	1,172,381	198,815	20%
All Other Revenue Resources	293,393	312,487	299,800	285,142	285,142	(14,658)	-5%
Operating Revenue	293,393	312,487	299,800	285,142	285,142	(14,658)	-5%
Total Revenue	1,064,387	1,145,667	1,273,366	1,277,706	1,457,523	184,157	14%
Materials & Services	231,207	153,104	426,135	105,325	305,325	(120,810)	-28%
Operating Expense	231,207	153,104	426,135	105,325	305,325	(120,810)	-28%
Reserve for Future Expenditures	-	-	58,252	-	58,252	-	-
Contingency	-	-	788,979	-	1,093,946	304,967	39%
Total Expense	231,207	153,104	1,273,366	105,325	1,457,523	184,157	14%
Ending Fund Balance - Restricted				1,172,381			
Revenues Less Expenses	833,180	992,563	-	-	-	-	
Significant Issues and Changes							



Benefits and Wellness

Employee Assistance Program/Wellness

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result (NEW)	Annual alignment of wellness programs with workforce need.	n/a	n/a	20%	5%	20%
Output (NEW)	Number of Wellness Program class participants.	n/a	n/a	100	26	150

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



Benefits and Wellness

Employee Assistance Program/Wellness

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	610,869	627,630	654,577	682,466	662,739	8,162	1%
Charges, Fees, License, Permits, Fines, Assessments	84,161	88,454	84,000	77,412	77,412	(6,588)	-8%
All Other Revenue Resources	80,462	85,755	84,450	80,433	80,433	(4,017)	-5%
Operating Revenue	164,623	174,209	168,450	157,845	157,845	(10,605)	-6%
Total Revenue	775,492	801,839	823,027	840,311	820,584	(2,443)	-0.3%
Materials & Services	147,862	119,373	168,450	177,572	177,572	9,122	5%
Operating Expense	147,862	119,373	168,450	177,572	177,572	9,122	5%
Contingency	-	-	654,577	-	643,012	(11,565)	-2%
Total Expense	147,862	119,373	823,027	177,572	820,584	(2,443)	-0.3%
Ending Fund Balance - Restricted				662,739			
Revenues Less Expenses	627,630	682,466	-	-	-	-	
Significant Issues and Changes							



Benefits and Wellness

Deferred Compensation

Purpose Statement

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

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

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



Benefits and Wellness

Deferred Compensation

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	2,082	2,082	2,082	2,082	5,682	3,600	173%
All Other Revenue Resources	2,004	100	5,400	5,400	-	(5,400)	-100%
Operating Revenue	2,004	100	5,400	5,400	-	(5,400)	-100%
Total Revenue	4,086	2,182	7,482	7,482	5,682	(1,800)	-24%
Materials & Services	2,004	100	5,400	1,800	4,700	(700)	-13%
Operating Expense	2,004	100	5,400	1,800	4,700	(700)	-13%
Contingency	-	-	2,082	-	982	(1,100)	-53%
Total Expense	2,004	100	7,482	1,800	5,682	(1,800)	-24%
Ending Fund Balance - Restricted				5,682			
Revenues Less Expenses	2,082	2,082	-	-	-	-	

Significant Issues and Changes



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:

COVID-19 pandemic risk and safety response and management:

From education, to risk reduction, safety management, and OSHA compliance, the Risk and Safety team is continuing to prioritize this as we head into our third year of the pandemic.

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

Countless efficiency improvements are emerging, thereby reducing administrative burden and allowing more time toward analysis and management of County risks and claims.

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 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result	Clackamas County will maintain a workers' compensation rating below the state's industry average.	0.71	0.71	1	0.74	1
Results	Maintain Clackamas County's ratio of actual liability claims losses paid to the actuarial estimate at 1 or below	0.65	0.60	1	Due close of books for FY 22	1
Result	By 2025, all classification specifications will contain risk management responsibilities.	0%	0%	100%	0%	100%
Result	By 2025, departments will have access to real time risk management data (examples: injury trends, claim expenses).	n/a	100%	100%	100%	100%
Output	Number of ergonomic assessments provided quarterly	20	21	25	24	25
Output	Number of liability claims.	n/a	21	120	40	120
Output	Number of workers' compensation claims processed quarterly	28	32	30	76	30
Output	Number of driving checks	376	379	380	257	400
Output	Number of unemployment claims.	n/a	104	120	120	120

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

The "Outputs" are broken down into five categories:

Ergonomics, liability claims, workers' compensation claims, driving checks and unemployment claims processed. Huge increases seen in unemployment claims last year, and not rolling over into increased driving checks this year, as a result of the COVID 19 pandemic.

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



Risk & Safety Management

Risk Administration

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	233,511	-	12,262	383,111	56,134	43,872	358%
Federal, State, Local, All Other Gifts & Donations	12,328	18,792	9,112	9,112	-	(9,112)	-100%
Charges, Fees, License, Permits, Fines, Assessments	-	1,825,032	1,628,709	1,628,709	1,669,427	40,718	3%
All Other Revenue Resources	167,474	188,474	168,443	-	-	(168,443)	-100%
Operating Revenue	179,802	2,032,298	1,806,264	1,637,821	1,669,427	(136,837)	-8%
Total Revenue	413,313	2,032,298	1,818,526	2,020,932	1,725,561	(92,965)	-5%
Personnel Services	1,124,624	1,402,639	1,495,376	1,326,933	1,410,925	(84,451)	-6%
Materials & Services	243,870	246,936	260,888	237,865	250,349	(10,539)	-4%
Operating Expense	1,368,494	1,649,575	1,756,264	1,564,798	1,661,274	(94,990)	-5%
Contingency	-	-	62,262	-	64,287	2,025	3%
Total Expense	1,368,494	1,649,575	1,818,526	1,564,798	1,725,561	(92,965)	-5%
Ending Fund Balance - Restricted				456,134			
Revenues Less Expenses	(955,181)	382,723	-	-	-	-	
Significant Issues and Changes							



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 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Output	Number of liability claims.	n/a	83	120	40	120
Results	Maintain Clackamas County's ratio of actual liability claims losses paid to the actuarial estimate at 1 or below	0.65	0.60	1	Due close of books for FY 22	1

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



Risk & Safety Management

Casualty/Liability

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	10,081,438	10,610,071	10,288,026	10,045,372	10,045,203	(242,823)	-2%
Charges, Fees, License, Permits, Fines, Assessments	3,176,426	1,888,229	1,983,253	2,083,253	2,132,335	149,082	8%
All Other Revenue Resources	160,531	138,286	175,000	125,000	100,000	(75,000)	-43%
Operating Revenue	3,336,957	2,026,515	2,158,253	2,208,253	2,232,335	74,082	3%
Total Revenue	13,418,395	12,636,586	12,446,279	12,253,625	12,277,538	(168,741)	-1%
Materials & Services	1,853,142	1,583,851	2,154,262	2,208,422	2,222,850	68,588	3%
Transfers	-	1,000,000	-	-	-	-	0%
Operating Expense	1,853,142	2,583,851	2,154,262	2,208,422	2,222,850	68,588	3%
Reserve for Future Expenditures	-	-	6,625,000	-	6,701,000	76,000	1%
Contingency	-	-	3,667,017	-	3,353,688	(313,329)	-9%
Total Expense	1,853,142	2,583,851	12,446,279	2,208,422	12,277,538	(168,741)	-1%
Ending Fund Balance - Restricted				10,045,203			
Revenues Less Expenses	11,565,253	10,052,735	-	-	-	-	
Significant Issues and Changes							



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 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Result	Clackamas County will maintain a workers' compensation rating below the state's industry average.	0.71	0.71	1	0.74	1
Output	Number of workers' compensation claims processed quarterly	28	32	30	36	30

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



Risk & Safety Management

Workers' Compensation

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	2,194,305	2,588,377	2,277,736	2,207,713	2,398,151	120,415	5%
Charges, Fees, License, Permits, Fines, Assessments	1,784,998	1,094,177	1,193,038	1,193,038	1,222,864	29,826	3%
Operating Revenue	1,784,998	1,094,177	1,193,038	1,193,038	1,222,864	29,826	3%
Total Revenue	3,979,303	3,682,554	3,470,774	3,400,751	3,621,015	150,241	4%
Materials & Services	1,390,926	1,473,886	1,246,000	1,402,600	1,290,500	44,500	4%
Operating Expense	1,390,926	1,473,886	1,246,000	1,402,600	1,290,500	44,500	4%
Reserve for Future Expenditures	-	-	1,735,000	-	2,141,000	406,000	23%
Contingency	-	-	489,774	-	189,515	(300,259)	-61%
Total Expense	1,390,926	1,473,886	3,470,774	1,402,600	3,621,015	150,241	4%
Ending Fund Balance - Restricted				1,998,151			
Revenues Less Expenses	2,588,377	2,208,668	-	-	-	-	
Significant Issues and Changes							



Risk & Safety Management

Unemployment

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

Key Performance Measures

		FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Target	FY 21-22 Actuals as of 12/31/21	FY 22-23 Target
Output	Number of Unemployment Claims.	n/a	450	120	120	120

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



Risk & Safety Management

Unemployment

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended	FY 21-22 Projected Year End	FY 22-23 Proposed	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	174,237	170,837	167,337	169,150	165,350	(1,987)	-1%
Charges, Fees, License, Permits, Fines, Assessments	180,528	222,404	300,000	200,000	200,000	(100,000)	-33%
Operating Revenue	180,528	222,404	300,000	200,000	200,000	(100,000)	-33%
Total Revenue	354,765	393,241	467,337	369,150	365,350	(101,987)	-22%
Materials & Services	183,928	224,091	303,800	203,800	203,800	(100,000)	-33%
Operating Expense	183,928	224,091	303,800	203,800	203,800	(100,000)	-33%
Contingency	-	-	163,537	-	161,550	(1,987)	-1%
Total Expense	183,928	224,091	467,337	203,800	365,350	(101,987)	-22%
Ending Fund Balance - Restricted				165,350			
Revenues Less Expenses	170,837	169,150	-	-	-	-	
Significant Issues and Changes							