



Human Resources

Evelyn Minor Lawrence, Director

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CLACKAMAS
C O U N T Y



Human Resources

Department Budget Summary by Fund

Line of Business	FY 18/19	FY 18/19	FY 18/19	FY 18/19	FY 18/19	FY 18/19
Program	FTE	General Fund	Self - Insurance Fund	Risk Management Claims Fund	Total Proposed Budget	General Fund Subsidy Included in Proposed Budget**
Administration						
Director's Office/Administrative Services	5.00	1,011,985			1,011,985	454,717
Workforce Data Management	3.50	598,087			598,087	114,002
Employee and Labor Relations						
Employee and Labor Relations	2.50	532,514			532,514	176,645
Workforce Design						
Classification and Compensation	4.00	655,801			655,801	108,931
Recruitment	6.00	1,071,941			1,071,941	219,147
Workforce Development and Planning	2.00	581,152			581,152	239,716
Benefits and Wellness						
Benefits and Wellness	11.25		37,129,321		37,129,321	
Risk Administration						
Risk Management	8.75			16,621,213	16,621,213	
TOTAL	43.00	4,451,480	37,129,321	16,621,213	58,202,014	1,313,158
FY 17/18 Budget	40.00	4,012,043	36,103,257	16,085,291	56,200,591	1,126,189
\$ Increase (Decrease)	3.00	439,437	1,026,064	535,922	2,001,423	186,969
% Increase (Decrease)	7.50%	10.95%	2.84%	3.30%	3.40%	16.60%

** General Fund subsidy is support from unrestricted General Fund revenues, primarily property tax
 Subsidy does not include resources generated by operations such as charges for service (including costs allocated to users) and grants



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 and Agencies so they can have the resources they need to provide high quality services and achieve their strategic results.

Human Resources Department	
Evelyn Minor-Lawrence, Director	
FTE 43	
Total Request \$58,202,014	
General Fund Support \$ 1,313,158	

Administration	Employee & Labor Relations	Workforce Design	Benefits Administration	Risk Administration
Evelyn Minor-Lawrence, Director	Eric Sarha, Assistant Director/ Chief Negotiator	Evelyn Minor-Lawrence, Director	Kristi Durham, Benefits Manager	Eric Machado, Risk Manager
Total Request \$1,610,072	Total Request \$532,514	Total Request \$2,308,894	Total Request \$37,129,321	Total Request \$16,621,213
Gen Fund \$ 568,719	Gen Fund \$ 176,645	Gen Fund \$ 567,794	Gen Fund \$ -	Gen Fund \$ -

Office of the Director/ Administrative Svc	Employee & Labor Relations	Classification & Compensation	Benefits & Wellness	Risk & Safety Management
Evelyn Minor-Lawrence, Director	Eric Sarha, Assistant Director/ Chief Negotiator	Heather Pedersen, Class & Comp Manager	Kristi Durham, Benefits Manager	Eric Machado, Risk Manager
FTE 5.0 (Total Staff 7.0)*	FTE 2.5 (Total Staff 3.0)*	FTE 4.0	FTE 11.25 (Total Staff 11.0)* (Plus temporary FTE)	FTE 8.75 (Total Staff 6.0)*
Total Request \$1,011,985	Total Request \$532,514	Total Request \$655,801	Total Request \$37,129,321	Total Request \$16,621,213
Gen Fund \$ 454,717	Gen Fund \$ 176,645	Gen Fund \$ 108,931	Gen Fund \$ -	Gen Fund \$ -

Workforce Data Management
Krista Weatherford, HR Business Systems Manager
FTE 3.5 (Total Staff 4.0)*
Total Request \$598,087
Gen Fund \$ 114,002

Recruitment
JJ Peters, Recruitment Manager
FTE 6.0
Total Request \$1,071,941
Gen Fund \$ 219,147

Workforce Development & Planning
Jeri Oswald, Learning & Development Manager
FTE 2.0
Total Request \$581,152
Gen Fund \$ 239,716

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



Line of Business Purpose Statement

The purpose of the Human Resources Administration Line of Business is to provide human resources direction, executive consultations and policy decision services to county administration, county departments and agencies so they can have a strategic business partner to achieve strategic and operational results.

<p>Human Resources Department Evelyn Minor-Lawrence, Director FTE 43 Total Request \$ 58,202,014 General Fund Support \$ 1,313,158</p>

<p>Administration Evelyn Minor-Lawrence, Director Total Request \$1,610,072</p>
<p>Gen Fund \$ 568,719</p>

<p>Office of the Director/ Administrative Svc Evelyn Minor-Lawrence, Director FTE 5.00 Total Request \$1,011,985</p>
<p>Gen Fund \$ 454,717</p>

<p>Workforce Data Management Krista Weatherford, HR Business Systems FTE 4.0 Total Request \$598,087</p>
<p>Gen Fund \$ 114,002</p>



Office of the Director/Administrative Services

Performance Narrative Statement

The Office of the Director and Administrative Services programs propose a \$1,011,990 budget, reflecting a continuation of current funding and service levels to deliver strategic HR direction to County departments and agencies, as well as internal human resources staff, so they can provide excellent human resource service delivery to our internal customers. These resources will allow us to effectively deliver and implement our annual HR initiatives, annual human resources budget, oversight of all human resources department programs, and specialized consultations for all customers at all levels within the County.

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Output	Number of services requested in each line of business per year	n/a	n/a	750	825

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

	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	762,883	553,157	624,535	628,384	552,268	(72,267)	-11.6%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	817	728	2,826	2,575	1,087	(1,739)	-61.5%
Interfund Transfers	-	-	-	-	-	-	0%
Operating Revenue	763,700	553,885	627,361	630,959	553,355	(74,006)	-11.8%
Total Rev - Including Beginning Bal	763,700	553,885	627,361	630,959	553,355	(74,006)	-11.8%
Personnel Services	491,832	576,988	651,655	650,255	632,696	(18,959)	-2.9%
Materials & Services	201,584	88,319	173,741	165,876	332,507	158,766	91.4%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	39,181	42,263	46,787	46,787	46,782	(5)	0.0%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	732,597	707,570	872,183	862,918	1,011,985	139,802	16.0%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
Total Exp - Including Special Categories	732,597	707,570	872,183	862,918	1,011,985	139,802	16.0%
General Fund Support (if applicable)	67,896	153,684	244,824	35,550	454,717	209,893	85.7%
Full Time Equiv Pos (FTE) Budgeted	5.00	5.00	5.00	5.00	5.00	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	5.00	5.00	-	5.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

The Internal Complaints Process is handled within the Office of the Director, and provides an avenue for employees to raise concerns related to protected class, harassment, or retaliation. During this fiscal year we have collaborated with Internal Audits and Public and Government Affairs (PGA) staff to develop a more transparent process and improve communications for all those involved in these cases. These efforts will continue in the upcoming fiscal year as we work to implement Internal Audit recommendations.



Workforce Data Management

Performance Narrative Statement

The Workforce Data Management program proposes a budget of \$598,087, reflecting a continuation of current funding and service levels. These resources provide systems management, reports and analysis, education services to HR, county departments and agencies so they can understand and use HR systems and data to make informed decisions and achieve their strategic results.

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Result	95% of departments submitting Personnel Actions not needing material corrections.	59%	80%	81%	85%
Output	Number of data transactions provided	9,521	9,000	9,000	10,000

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

	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	194,019	387,210	437,173	439,061	484,085	46,912	10.7%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	572	509	1,978	1,803	761	(1,217)	-61.5%
Interfund Transfers	-	-	-	-	-	-	0%
Operating Revenue	194,591	387,719	439,151	440,864	484,846	45,695	10.4%
Total Rev - Including Beginning Bal	194,591	387,719	439,151	440,864	484,846	45,695	10.4%
Personnel Services	344,283	403,891	456,160	455,179	484,085	27,925	6.1%
Materials & Services	70,409	61,823	121,618	114,572	81,255	(40,363)	-33.2%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	27,427	29,584	32,751	32,751	32,747	(4)	0.0%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	442,119	495,298	610,529	602,502	598,087	(12,442)	-2.0%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
Total Exp - Including Special Categories	442,119	495,298	610,529	602,502	598,087	(12,442)	-2.0%
General Fund Support (if applicable)	47,528	107,580	171,377	199,828	114,002	(57,375)	-33.5%
Full Time Equiv Pos (FTE) Budgeted	4.00	4.80	4.50	4.50	3.50	(1.00)	-22.22%
Full Time Equiv Pos (FTE) Filled at Yr End	4.00	3.80	-	4.50	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	1.00	-	-	-	-	0%

Significant Issues and Changes

The Workforce Data Management team has been instrumental in leading the effort of an outside consultant to evaluate the business processes and methods used by Human Resources. This work is being accomplished through an assessment designed to analyze, evaluate, and document Human Resources business processes in order to support and serve the workforce of Clackamas County. Initial recommendations from this initiative are slated to be delivered by June, 2018.



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Employee and Labor Relations

Line of Business Purpose Statement

The purpose of the Employee and Labor Relations line of business is to provide collective bargaining and labor contract administration services to Board of County Commissioners, County Administration, and departments so they can define, understand, and administer employee relations, labor relations and discipline of employment for certain groups of employees and to resolve disputes.

Human Resources Department

Evelyn Minor-Lawrence, Director

FTE 43

Total Request \$ 58,202,014

General Fund Support \$ 1,313,158

Employee & Labor Relations

Eric Sarha,
Assistant Director/
Chief Negotiator

Total Request
\$532,514

Gen Fund \$ 176,645

Employee & Labor Relations

Eric Sarha,
Assistant Director/
Chief Negotiator

Total Request
\$532,514

Gen Fund \$ 176,645



Employee and Labor Relations

Employee and Labor Relations

Performance Narrative Statement

The Employee and Labor Relations program proposes a \$532,514 budget, reflecting a continuation of current funding and service levels. The purpose of the Employee and Labor Relations program is to provide discipline administration, collective bargaining and labor contract administration services to BCC, County Administration and Departments so they can gain the tools to manage a productive workforce and maintain good labor relations.

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Output	Number of grievances resolved	29	n/a	41	50
Output	Number of discipline administration consultations with HR provided in advance of the imposed written reprimand or disciplinary action	56	n/a	102	112

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

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

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

Explanation



Employee and Labor Relations

Employee and Labor Relations

Budget Summary

	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	281,442	276,578	312,267	313,615	355,869	43,602	14.0%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	408	364	1,413	1,288	543	(870)	-61.6%
Interfund Transfers	-	-	-	-	-	-	0%
Operating Revenue	281,850	276,942	313,680	314,903	356,412	42,732	13.6%
Total Rev - Including Beginning Bal	281,850	276,942	313,680	314,903	356,412	42,732	13.6%
Personnel Services	245,916	288,494	325,828	325,128	355,869	30,041	9.2%
Materials & Services	50,292	44,159	86,870	81,837	153,254	66,384	76.4%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	19,591	21,132	23,393	23,393	23,391	(2)	0.0%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	315,799	353,785	436,091	430,358	532,514	96,423	22.1%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
Total Exp - Including Special Categories	315,799	353,785	436,091	430,358	532,514	96,423	22.1%
General Fund Support (if applicable)	33,949	76,843	122,412	142,735	176,645	54,233	44.3%
Full Time Equiv Pos (FTE) Budgeted	1.50	1.50	1.50	1.50	2.50	1.00	66.67%
Full Time Equiv Pos (FTE) Filled at Yr End	1.50	1.50	-	1.50	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

Our goal is to reduce liability to the County regarding employment actions by resolving issues at the lowest level and ensuring that managers are providing employees with due process in the administration of discipline. To this end, the Employee and Labor Relations program added one full-time employee during the 2017-2018 fiscal year to partner 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; strategizing how to address issues proactively; assisting with workplace conflict resolution; responding to employee performance issues and grievances; and providing guidance and conducting training on policies and other employee and labor relations subjects. We anticipate the addition of this resource will allow us to provide greater management support Countywide for these critical issues posing significant liability to the County.

As of April 16, 2018, the County reached a tentative agreement with the Clackamas County Peace Officers Association (CCPOA) on their contract that expired on June 30, 2017. Ratification is anticipated within the next few weeks. Staff is also bargaining six separate contracts (three with AFSCME and three with the Employees' Association) that are set to expire on June 30, 2018. The County has contracted with a local law firm to assist with negotiations for the AFSCME contracts.



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Workforce Design

Line of Business Purpose Statement

The purpose of the Workforce Design line of business is to provide Classification and Compensation, Recruitment, and Workforce Development and Planning services to County departments and agencies so they can plan for, attract and retain the qualified and diverse workforce they need to achieve their strategic results.

Human Resources Department

Evelyn Minor-Lawrence, Director

FTE 43

Total Request \$ 58,202,014

General Fund Support \$ 1,313,158

Workforce Design

Evelyn Minor-Lawrence,
Director

Total Request
\$2,308,894

Gen Fund \$ 567,794

Classification & Compensation

Heather Pedersen, Class
& Comp Manager

FTE 4.0

Total Request
\$655,801

Gen Fund \$ 108,931

Recruitment

JJ Peters,
Recruitment Manager

FTE 6.0

Total Request
\$1,071,941

Gen Fund \$ 219,147

Workforce Development & Planning

Jeri Oswalt,
Learning & Development
Manager

FTE 2.0

Total Request
\$581,152

Gen Fund \$ 239,716



Workforce Design Classification and Compensation

Performance Narrative Statement

The Classification and Compensation program propose a \$655,801 budget, reflecting a continuation of current funding and service levels. The purpose of the Classification and Compensation program is to provide up-to-date plans, positions and organizational structure consultation services to County Departments and Agencies so they can structure their organizations in a way that places the right person in the right classification at the appropriate pay to achieve their operational and strategic results.

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Output	Number of position allocations, recommendations and determinations provided	185	n/a	265	265
Output	Number of market studies conducted (individual classifications and job families)	56	n/a	98	100

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



Classification and Compensation

Budget Summary

	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	450,307	442,525	499,627	501,784	546,870	47,243	9.5%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	653	582	2,261	2,060	870	(1,391)	-61.5%
Interfund Transfers	-	-	-	-	-	-	0%
Operating Revenue	450,960	443,107	501,888	503,844	547,740	45,852	9.1%
Total Rev - Including Beginning Bal	450,960	443,107	501,888	503,844	547,740	45,852	9.1%
Personnel Services	292,466	461,590	521,325	520,204	546,870	25,545	4.9%
Materials & Services	80,468	70,655	138,992	130,940	71,506	(67,486)	-48.6%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	31,345	33,811	37,429	37,429	37,425	(4)	0.0%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	404,279	566,056	697,746	688,573	655,801	(41,945)	-6.0%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
Total Exp - Including Special Categories	404,279	566,056	697,746	688,573	655,801	(41,945)	-6.0%
General Fund Support (if applicable)	54,318	122,948	195,859	228,375	108,931	(86,928)	-44.4%
Full Time Equiv Pos (FTE) Budgeted	2.00	3.00	3.00	3.00	4.00	1.00	33.33%
Full Time Equiv Pos (FTE) Filled at Yr End	2.00	3.00	-	3.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

In response to increasing demands for services Countywide, the Classification and Compensation program has received approval for an additional position in the upcoming fiscal year. While the program has been utilizing temporary staff resources for the last year and a half, the demands for Classification & Compensation's services prompted the request to add a full time Human Resources Specialist position. The addition of this position will allow us to keep pace with our efforts to systematically review and update our classifications, ensure appropriate compensation, and provide consultation on department reorganizations, as well as be responsive to external factors such as the new pay equity law and changes in minimum wage.



Workforce Design

Recruitment

Performance Narrative Statement

The Recruitment Program proposes a budget of \$1,071,941 reflecting a continuation of current funding and service levels. The purpose of the Recruitment Program is to provide consultation, outreach, evaluation and selection services to County Departments and agencies so they can hire and retain the qualified, diverse workforce they need to achieve their strategic results.

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Result	70% of open positions are filled by qualified, diverse candidates within 90 days from the date of requisition	n/a	n/a	n/a	65%
Output	Number of hires per year	282	320	320	320
Output	Number of job postings per year	247	n/a	260	260
Output	Number of recruitment outreach events per year	31	24	24	24

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

Budget Summary

	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	675,461	663,788	749,440	752,676	852,794	103,354	13.8%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	980	873	3,391	3,091	1,304	(2,087)	-61.5%
Interfund Transfers	-	-	-	-	-	-	0%
Operating Revenue	676,441	664,661	752,831	755,767	854,098	101,267	13.5%
Total Rev - Including Beginning Bal	676,441	664,661	752,831	755,767	854,098	101,267	13.5%
Personnel Services	590,199	692,385	781,988	780,306	852,794	70,806	9.1%
Materials & Services	120,701	105,982	208,488	196,410	163,009	(45,479)	-21.8%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	47,017	50,716	56,144	56,144	56,138	(6)	0.0%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	757,917	849,083	1,046,620	1,032,860	1,071,941	25,321	2.4%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
Total Exp - Including Special Categories	757,917	849,083	1,046,620	1,032,860	1,071,941	25,321	2.4%
General Fund Support (if applicable)	81,477	184,422	293,788	342,563	219,147	(74,641)	-25.4%
Full Time Equiv Pos (FTE) Budgeted	6.00	6.00	6.00	6.00	6.00	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	6.00	6.00	-	6.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

Based on the current trend and projection, demand for recruitment has remained high and is expected to be 5% higher than FY 16-17. The two main drivers are retirements and a better economy, as employees are more likely to change jobs or employers.

On average, each of the five (5) recruiters is projected to coordinate 52 recruitments this current fiscal year, resulting in 64 hires. We have recently made some shifts in our staffing assignments to continue to reduce the backlog of recruitments awaiting assignment, and have added backup recruiter assignments for H3S, DTD, and WES, as these departments represent the highest percentage of the recruitment backlog.

Another indicator that recruitment demand is trending up is the fact that despite being on target to complete approximately 38 more recruitments this fiscal year, our backlog has held steady at 18, compared to 19 last year.



Workforce Design

Workforce Development and Planning

Performance Narrative Statement

The Workforce Development and Planning program proposes a \$581,152 budget, reflecting a continuation of current funding and service levels. The purpose of the Workforce Development and Planning program is to provide informal/formal learning events and individual development planning with advanced planning consultations and strategic business plan integration services to County Departments and agencies so they can anticipate and respond to the departments' current and future workforce needs.

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Result	90% of Learning & Development participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time	95%	95%	95%	95%
Output	Number of Leadership Academy engagements provided	45	45	45	45
Output	Number of County employees receiving learning and development services	2235	2000	2300	2500
Output	Number of workforce plans developed	0	2	2	4

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

	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	-	-	-	-	-	-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	225,154	221,263	249,813	250,892	341,436	91,623	36.7%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	327	291	1,130	1,030	435	(695)	-61.5%
Interfund Transfers	-	-	-	-	-	-	0%
Operating Revenue	225,481	221,554	250,943	251,922	341,871	90,928	36.2%
Total Rev - Including Beginning Bal	225,481	221,554	250,943	251,922	341,871	90,928	36.2%
Personnel Services	196,733	230,795	260,663	260,102	341,436	80,773	31.0%
Materials & Services	40,234	35,327	69,496	65,470	221,003	221,003	218.0%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	15,672	16,905	18,715	18,715	18,713	(2)	0%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	252,639	283,027	348,874	344,287	581,152	301,774	66.6%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
Total Exp - Including Special Categories	252,639	283,027	348,874	344,287	581,152	301,774	66.6%
General Fund Support (if applicable)	27,159	61,474	97,929	114,188	239,716	141,787	144.8%
Full Time Equiv Pos (FTE) Budgeted	2.00	2.00	2.00	2.00	2.00	-	0%
Full Time Equiv Pos (FTE) Filled at Yr End	2.00	2.00	-	2.00	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

The Workforce Development and Planning team has made significant progress in their efforts to redesign the County's employee performance management system. Efforts to date include conducting department needs assessments and focus group sessions, as well as other targeted, best practice research. The team is currently developing recommendations for County Administration on how to best redesign and relaunch the program Countywide.



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Benefits and Wellness

Line of Business Purpose Statement

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

Human Resources Department

Evelyn Minor-Lawrence, Director

FTE 43

Total Request \$ 58,202,014

General Fund Support \$ 1,313,158

Benefits Administration

Kristi Durham,
Benefits Manager

Total Request
\$37,129,321

Gen Fund \$ -

Benefits & Wellness

Kristi Durham,
Benefits Manager

FTE 11.0

Total Request
\$37,129,321

Gen Fund \$ -



Benefits and Wellness Administration

Benefits and Wellness

Performance Narrative Statement

The Benefits and Wellness program proposes a \$37,129,321 budget, reflecting a continuation of current funding and service levels. The purpose of the Benefits and Wellness program is to provide cost-effective, responsive and comprehensive benefit services to County departments, current and retired employees and their family members so they can better serve the residents of Clackamas County.

Key Performance Measures

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Output	Number of Providence medical enrollments	1328	1297	1297	1300
Output	Number of Kaiser medical enrollments	692	733	733	730

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

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

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

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



Budget Summary

	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	4,531,778	1,627,706	4,435,385	4,435,385	4,190,189	(245,196)	-5.5%
Prior Year Revenue	27,329,890	29,029,113	29,354,272	28,306,799	29,592,387	238,115	0.8%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	-	-	2,313,600	2,001,120	3,346,745	1,033,145	44.7%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Operating Revenue	27,329,890	29,029,113	31,667,872	30,307,919	32,939,132	1,271,260	4.0%
Total Rev - Including Beginning Bal	31,861,668	30,656,819	36,103,257	34,743,304	37,129,321	1,026,064	2.8%
Personnel Services	-	-	1,380,004	1,339,804	1,628,886	248,882	18.0%
Materials & Services	30,093,762	25,885,974	31,173,994	29,094,039	30,612,193	(561,801)	-1.8%
Indirect Costs (Internal Dept Chgs)	-	250,000	-	-	-	-	0%
Cost Allocation Charges	8,121	10,480	119,272	119,272	98,570	(20,702)	-17.4%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	30,101,883	26,146,454	32,673,270	30,553,115	32,339,649	(333,621)	-1.0%
Debt Service	-	-	-	-	-	-	0%
Special Payments	132,078	74,979	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	3,429,987	-	4,789,672	1,359,685	39.6%
Total Exp - Including Special Categories	30,233,961	26,221,433	36,103,257	30,553,115	37,129,321	1,026,064	2.8%
General Fund Support (if applicable)	0	0	0	0	0	-	0%
Full Time Equiv Pos (FTE) Budgeted	9.64	9.64	9.64	11.25	11.25	1.61	16.7%
Full Time Equiv Pos (FTE) Filled at Yr End	9.64	9.64	-	9.25	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	2.00	-	-	0%

Significant Issues and Changes

We are continuing to evolve the benefits administration fee model, to include capturing over \$1M toward the self-insured reserves requirements. This will allow us to fully state both dental and disability reserves in fund 760 by the end of the 18-19 fiscal year, as well as a significant portion of the medical reserve.



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Risk Administration

Risk Administration Purpose Statement

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

Human Resources Department

Evelyn Minor-Lawrence, Director

FTE 43

Total Request \$ 58,202,014

General Fund Support \$ 1,313,158

Risk Administration

Eric Machado,
Risk Manager

Total Request
\$16,621,213

Gen Fund \$ -

Risk & Safety Management

Eric Machado,
Risk Manager

FTE 8.75

Total Request
\$16,621,213

Gen Fund \$ -



Risk Administration

Risk Management Program

Performance Narrative Statement

The Risk and Safety Management program proposes a \$16,621,213 budget, reflecting a continuation of current funding and service levels. The purpose of the Risk Management program is to provide loss prevention and control, liability and workers' compensation administration, consultations and analysis services to County departments and agencies so they can create a workplace culture committed to practices that eliminate risk, sustain a healthy and productive workforce and preserve financial resources.

Key Performance Measures

		FY 16-17 Actual	FY 17-18 Target	FY 17-18 Projected Performance	FY 18-19 Target
Results	Each year the ratio of liability claims paid, when compared to the actuarial recommendation is 1 or less	n/a	n/a	n/a	1 or less
Results	Beginning with 10% of departments in 2018 and increasing by 10% each year through 2021 (40%), departments will have no increase in their number of Workers' Compensations claims per employee (FTE)	n/a	n/a	n/a	10% with no increase
Output	Number of ergonomic assessments provided quarterly	n/a	n/a	n/a	20
Output	Number of workers' compensation claims processed quarterly	n/a	n/a	n/a	20

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

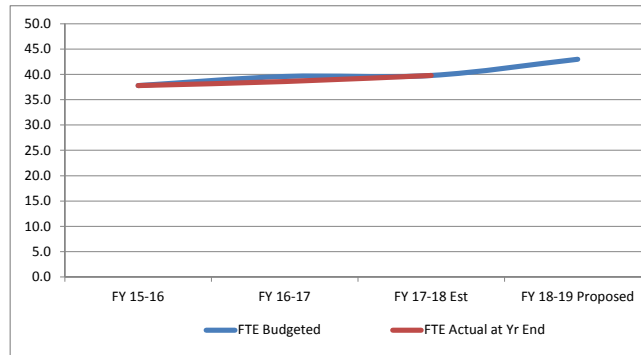
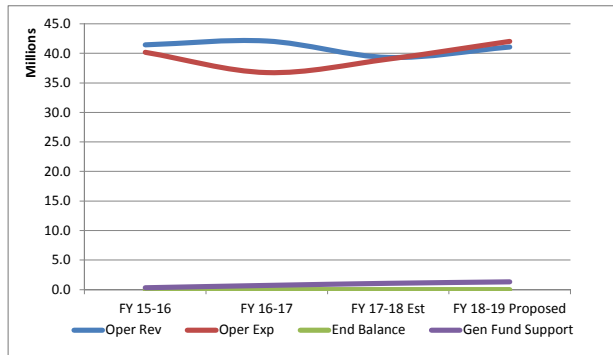
	FY 15-16 Actual	FY 16-17 Actual	FY 17-18 Amended Budget	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	2,326,727	6,794,971	10,030,370	10,030,370	11,623,326	1,592,956	15.9%
Prior Year Revenue							0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	8,117,496	7,919,809	5,900,361	5,900,362	4,787,852	(1,112,509)	-18.9%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	169,440	66,250	154,560	204,560	210,035	55,475	35.9%
Interfund Transfers	750,000	-	-	-	-	-	0%
Operating Revenue	9,036,936	7,986,059	6,054,921	6,104,922	4,997,887	(1,057,034)	-17.5%
Total Rev - Including Beginning Bal	11,363,663	14,781,030	16,085,291	16,135,292	16,621,213	535,922	3.3%
Personnel Services	-	-	1,158,793	1,159,155	1,262,264	103,471	8.9%
Materials & Services	4,558,747	4,737,373	5,210,318	4,625,259	3,865,822	(1,344,496)	-25.8%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	9,946	13,287	91,522	91,522	109,207	17,685	19.3%
Capital Outlay	-	-	-	-	-	-	0%
Operating Expenditure	4,568,693	4,750,660	6,460,633	4,511,966	5,237,293	(1,223,340)	-18.9%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	2,558,623	-	3,310,426	751,803	29.4%
Contingency	-	-	7,066,035	-	8,073,494	1,007,459	14.3%
Total Exp - Including Special Categories	4,568,693	4,750,660	16,085,291	4,511,966	16,621,213	535,922	3.3%
General Fund Support (if applicable)	0	0	0	0	0	-	0%
Full Time Equiv Pos (FTE) Budgeted	8.16	8.16	8.16	8.16	8.75	0.59	7.2%
Full Time Equiv Pos (FTE) Filled at Yr End	8.16	8.16	-	8.16	-	-	0%
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-	-	0%

Significant Issues and Changes

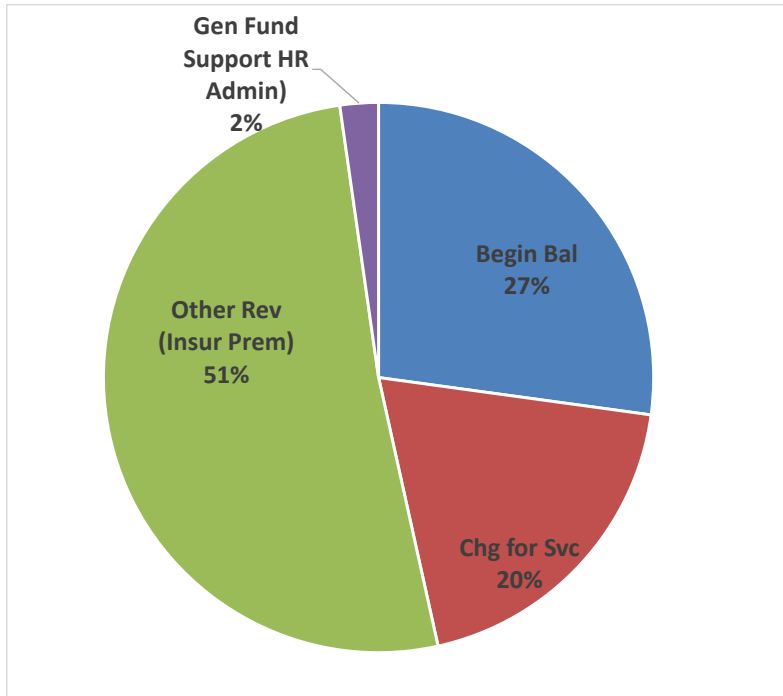
Due to lower than anticipated claims costs, which resulted in improved stability of the Risk Fund, we were able to reduce the total County allocation by \$750,000 (or 14%) for FY 18/19, all while increasing division FTE by .5. The additional FTE will be concentrated on ergonomic initiatives, thereby allowing the existing Safety and Loss Control Analysts to focus on more pressing risk issues that affect the County.

**Human Resources Department
Summary of Revenue and Expense**

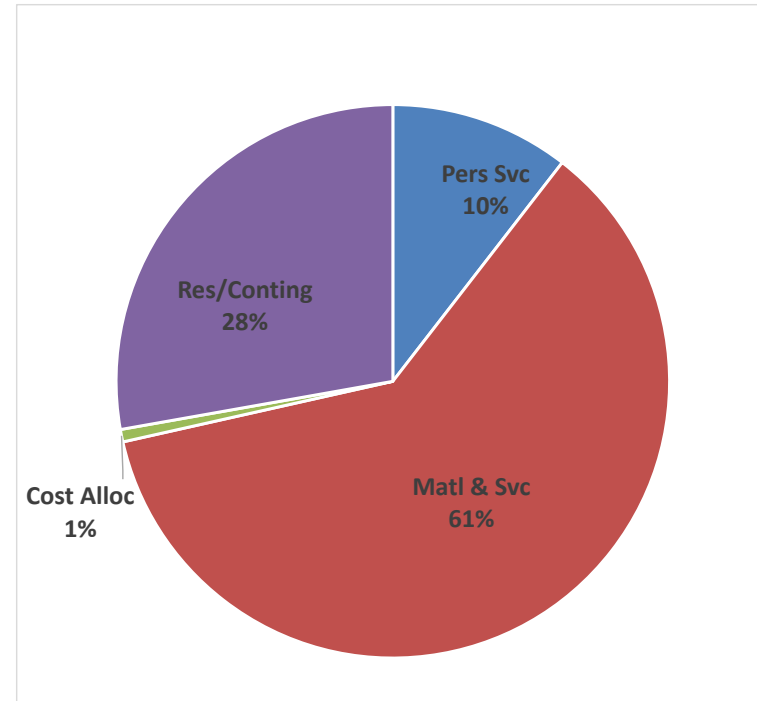
	FY 15-16	FY 16-17	FY 17-18 Amended Budgeted	FY 17-18 Projected Year End	FY 18-19 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Balance	6,858,504	8,422,677	14,465,755	14,465,756	15,813,515	1,347,760	9.3%
Prior Year Revenue	0	0	0	0	0	0	0%
Taxes	0	0	0	0	0	0	0%
Licenses & Permits	0	0	0	0	0	0	0%
Federal Grants & Revenues	0	0	0	0	0	0	0%
State Grants & Revenues	0	0	0	0	0	0	0%
Local Grants & Revenues	0	0	0	0	0	0	0%
Charges for Service	13,177,810	12,980,570	11,086,815	10,786,740	11,267,919	181,104	1.6%
Fines & Penalties	0	0	0	0	0	0	0%
Other Revenues (insurance Premiums)	27,513,715	29,110,570	29,521,832	28,524,359	29,807,422	285,590	1.0%
Interfund Transfers	750,000	0	0	0	0	0	0%
Operating Revenue	41,441,525	42,091,140	40,608,647	39,311,099	41,075,341	466,694	1.1%
% Change	NA	1.6%	-3.5%	-6.6%	4.5%		
Personnel Services	4,425,073	4,865,013	5,536,417	5,490,133	6,104,900	568,483	10.3%
Materials & Services	35,262,000	31,166,423	37,183,516	33,108,232	35,500,549	-1,682,967	-4.5%
Special Payments	132,078	74,979	0	0	0	0	0%
Indirect Costs	0	250,000	0	0	0	0	0%
Cost Allocation Charges	360,407	390,300	426,013	426,013	422,973	-3,040	-0.7%
Debt Service	0	0	0	0	0	0	0%
Interfund Transfers	0	0	0	0	0	0	0%
Capital Outlay	0	0	0	2,201	0	0	0%
Operating Expenditure	40,179,558	36,746,715	43,145,946	39,026,579	42,028,422	-1,117,524	-2.6%
% Change	NA	-8.5%	17.4%	6.2%	7.7%		
Reserve for Future Expenditures	0	0	2,558,623	0	3,310,426	751,803	29.4%
Contingency	0	0	10,496,022	0	12,863,166	2,367,144	22.6%
Total Expenditure	40,179,558	36,746,715	56,200,591	39,026,579	58,202,014	2,001,423	3.6%
Ending Balance (if applicable) (includes Reserve & Contingency)							
General Fund Support (if applicable)	312,327	706,951	1,126,189	1,063,239	1,313,158	186,969	16.6%
Full Time Equiv Positions (FTE) Budgeted	37.8	39.6	39.8		43.0	3.2	8.0%
Full Time Equiv Positions (FTE) Filled at Yr End	37.8	38.6		39.8			
Full Time Equiv Positions (FTE) Vacant at Yr End	0.0	1.0		0.0			



**Human Resources Department
FY 18-19 Proposed Budget**



Resources



Requirements