



Human Resources

2021-2022 BUDGET PRESENTATION



2020 Major Accomplishments

AREA	DESCRIPTION
Equal Pay Analysis	<p>Classification & Compensation – Directed the completion of the comprehensive Equal Pay Analysis study of all County positions, conducted by external consultants. Study outcomes include an analysis of current pay disparities, and pay practice and compensation structure recommendations to maintain pay equity and comply with the Oregon Equal Pay Act going forward.</p> <p>Workforce Data Management – Partnered with Technology Services staff and external consultants to begin developing system enhancements to monitor and maintain pay equity within the workforce.</p>
COVID Response	<p>Risk & Safety – Played key role in the County's workplace COVID response, from risk reduction to safety management/compliance. This role continues as the County enters into the second year of the pandemic.</p> <p>Employee & Labor Relations - Provided leadership and guidance to County managers and supervisor throughout the course of the pandemic, from policy development, impact bargaining, to advising on highly complex and sensitive employee relations matters.</p> <p>Benefits & Wellness - From July 1, 2020 through March 31, 2021, handled a 104% increase in leave requests. Administered 532 FFCRA and Temporary COVID-19 Leaves, in addition to 270 FMLA/OFLA leaves.</p>
Employee Engagement	<p>Workforce Planning & Development - Partnered with TalentMap to successfully launch the first County-wide employee engagement survey.</p>
Equity Lens	<p>Recruitment & Selection ~ Workforce Planning & Development ~ Director's Office (Internal Complaints) – Engaged in multi-disciplinary discussion series with staff from the Office of Equity and Inclusion, County Counsel, and Human Resources to discover commonalities and how we can collaborate to address these key common areas.</p>
Process Improvement	<p>Benefits & Wellness - Engaged in extensive discovery over period of eight (8) months, including conducting focus groups with stakeholders. This effort resulted in final recommendations for implementation of the Benefits Service Delivery Strategy.</p>
Compliance	<p>Workforce Planning & Development – Successfully launched County-wide Harassment Prevention Training for all employees; obtained 95% completion rate within three months.</p>

Performance Clackamas

Results Measures (Examples)

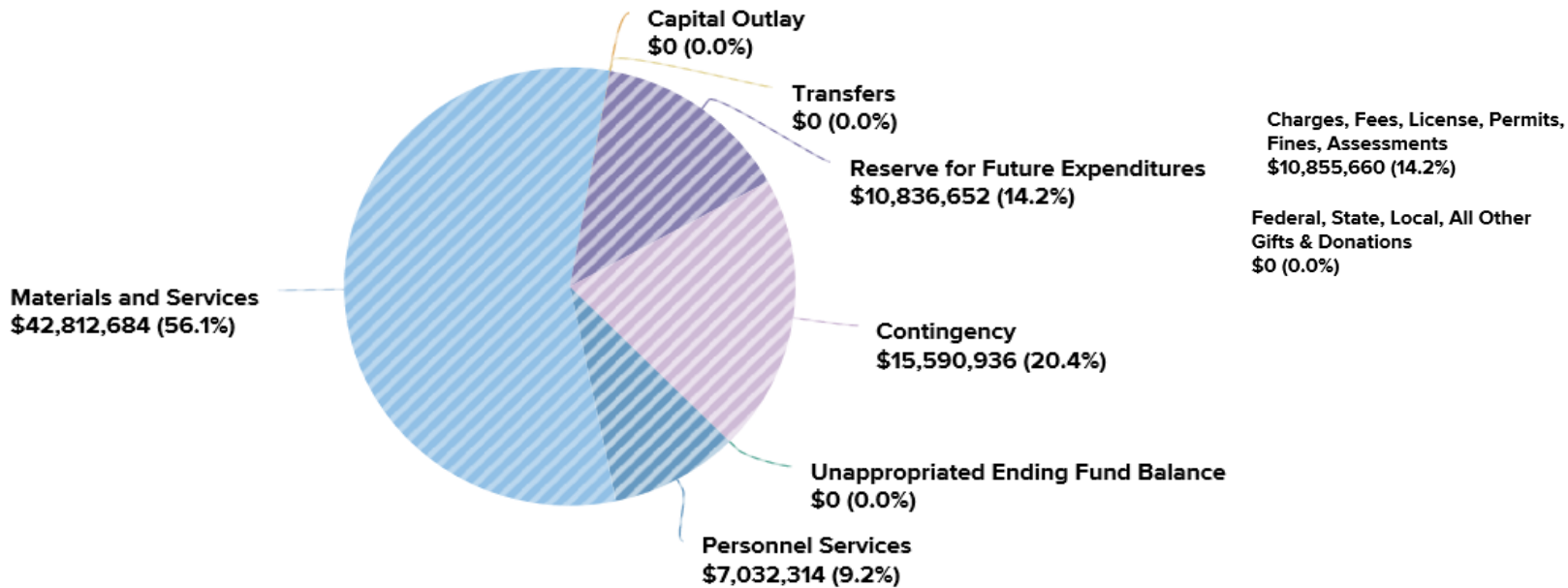
Line of Business/Program	Results Measure	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Projected Performance	FY 21-22 Target
Director's Office	By 2021, 90% of Clackamas County managers agree or strongly agree that Human Resources is a strategic business partner.	90%	90%	92%	90%
Workforce Data Management	80% of HR Managers, HR Staff, and PA Processors reporting by survey that business and system enhancements have improved their daily operations and achieve strategic results.	n/a	80%	81%	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	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%	20%	18%	20%
Recruitment & Selection	70% of open positions are filled within 90 days from the date of requisition.	38%	65%	46%	65%
Workforce Planning & Development	90% of Learning & Development participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time.	95%	90%	90%	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	90%	70%	90%
Risk & Safety	Clackamas County will maintain a workers' compensation rating below the state's industry average.	0.71	Below 1	0.71	Below 1

Program Profiles: 2021-22 Summary

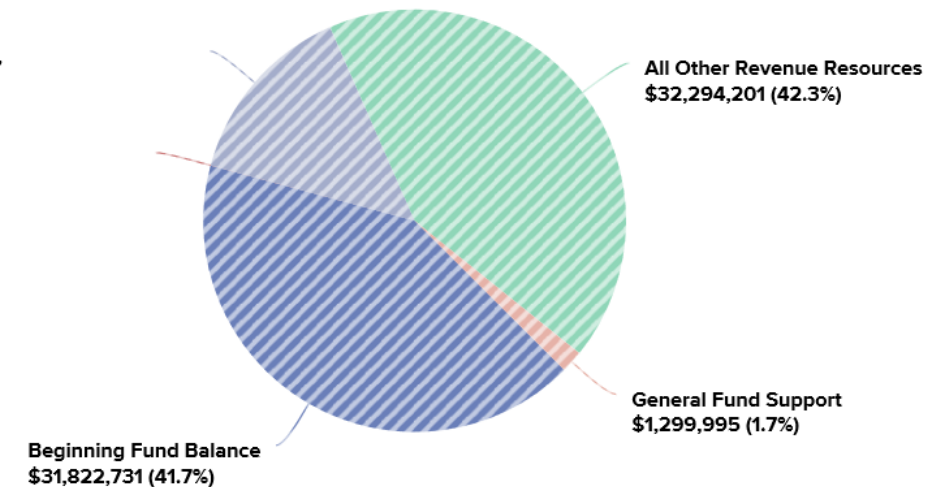
Line of Business	Program	Total Funds (\$ millions)	% County General Funds	% Restricted Funds	Mandate: Fed/State/Cty /IGA/None	% Program Operated by County	Metrics: % Target Meet/Exceed or Improve
Administration	Office of the Director/Administration	\$948,341	100%	0%	Equal Employment Opportunity Commission	100%	100%
Administration	Workforce Data Management	\$820,442	100%	0%	Equal Employment Opportunity Commission	100%	50%
Employee & Labor Relations	Employee & Labor Relations	\$808,125	100%	0%	Equal Employment Opportunity Commission and Employee Relations Board	100%	50%
Workforce Design	Classification & Compensation	\$878,893	100%	0%	Equal Employment Opportunity Commission	100%	100%
Workforce Design	Recruitment & Selection	\$923,575	100%	0%	Equal Employment Opportunity Commission	100%	100%
Workforce Design	Workforce Planning & Design		100%	0%	Equal Employment Opportunity Commission	100%	33%
Benefits & Wellness	Benefits & Wellness	\$53,015,083	0%	15%	ACA, COBRA, FMLA, ADA, FFCRA	80%	33%
Risk & Safety	Risk & Safety	\$18,351,542	0%	46%		90%	100%

2021/22 Revenue and Expenses

Revenue



Expenditures



Summary of Revenue & Expenses

Human Resources Department (16) Summary of Revenue and Expense

	FY 18-19 Actuals	FY 19-20 Actuals	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	19,701,536	24,929,389	30,072,717	31,144,078	31,822,731	1,750,014	5.8%
Federal, State, Local, All Other Gifts & Donations	-	24,132	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	11,627,862	12,588,595	10,681,502	10,827,013	10,855,660	174,158	1.6%
All Other Revenue Resources	29,553,531	30,587,820	30,315,766	31,737,812	32,294,201	1,978,435	6.5%
General Fund Support	861,996	517,644	1,192,986	1,148,786	1,299,995	107,009	9.0%
Operating Revenue	42,043,389	43,718,191	42,190,254	43,713,611	44,449,856	2,259,602	5.4%
Total Revenue	61,744,925	68,647,580	72,262,971	74,857,689	76,272,587	4,009,616	5.5%
Personnel Services	5,754,729	6,188,268	6,772,088	6,734,056	7,032,314	260,226	3.8%
Materials and Services	31,060,515	31,315,233	41,196,314	35,300,902	42,812,684	1,616,370	3.9%
Capital Outlay	293	-	-	-	-	-	0%
Operating Expense	36,815,537	37,503,501	47,968,402	42,034,958	49,844,998	1,876,596	3.9%
Transfers	-	-	1,000,000	1,000,000	0	-1,000,000	-100.0%
Reserve for Future Expenditures	-	-	5,555,858	0	10,836,652	5,280,794	95.0%
Contingency	-	-	17,738,711	0	15,590,936	-2,147,775	-12.1%
Total Expense	36,815,537	37,503,501	72,262,971	43,034,959	76,272,587	4,009,616	5.5%
Revenues Less Expenses	24,929,388	31,144,079	-	31,822,730	-	-	-
Full Time Equiv Positions (FTE) Budgeted	39.6	43.0	43.0	43.0	43.0	0.0	0%

Human Resources



Department Summary by Fund

Human Resources Department (16)

Department Budget Summary by Fund

<i>Line of Business</i>	FY 21/22	FY 21/22	FY 21/22	FY 21/22	FY 21/22	FY 21/22
<i>Program</i>	FTE	General Fund	Self - Insurance Fund	Risk Management Claims Fund	Total Proposed Budget	General Fund Support Included in Proposed Budget**
Administration						
Director's Office/Administrative Services	5.0	948,340			948,340	212,498
Workforce Data Management	4.5	820,442			820,442	217,499
Employee & Labor Relations Management						
Employee and Labor Relations	2.5	808,125			808,125	217,500
Workforce Design						
Classification and Compensation	4.0	878,893			878,893	217,499
Recruitment and Selection	5.0	923,576			923,576	217,500
Workforce Development and Planning	2.0	684,323			684,323	217,499
Benefits, Wellness, Leave Management						
Benefits Administration	11.2		4,637,865		4,637,865	
Medical Insurance			42,114,369		42,114,369	
Dental Insurance			4,158,974		4,158,974	
Disability Insurance			1,273,366		1,273,366	
Employee Assistance Program/Wellness			823,027		823,027	
Deferred Compensation			7,482		7,482	
Risk & Safety Management						
Risk Administration	8.8			1,809,414	1,809,414	
Casualty/Liability				12,446,279	12,446,279	
Workers' Compensation				3,470,774	3,470,774	
Unemployment				467,337	467,337	
TOTAL	43.0	5,063,699	53,015,083	18,193,804	76,272,586	1,299,995
FY 20/21 Budget	43.0	4,940,449	49,015,767	18,306,755	72,262,971	1,192,986
\$ Increase (Decrease)	0.0	123,250	3,999,316	-112,951	4,009,615	107,009
% Increase (Decrease)	0.0%	2.5%	8.2%	-0.6%	5.5%	9.0%

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

Significant Policy and/or Financial Issues

DESCRIPTION	IMPACT
Oregon Equal Pay Act – Address key findings described in the Pay Equity Analysis	If we do not address the key findings, the County will not be in compliance with the Equal Pay Act. We anticipate a financial impact to the County to address existing pay disparities and to update and revise compensation policies and business practices.
Oregon Equal Pay Act – Development and implementation of new business practices and system enhancements to monitor and maintain pay equity within the workforce	Significant financial and workload impact to the <i>Workforce Data Management</i> program to implement system enhancements so the County is in compliance with the Equal Pay Act; lack of compliance will result in financial penalties to the organization.
Collective Bargaining Negotiations - bargaining with unions related to successor agreements with the Employees' Association and AFSCME units, as well as bargaining t the implementation of audit findings and new pay practices related to implementation of the Oregon Equal Pay Law	Significant workload impact to Employee & Labor Relations team, as well as potential for implementation delays due to bargaining complex and sensitive topics
Employment Policy & Practices (EPP) – County Code Integration Project	Update all County employment related policies to ensure compliance with recent changes federal and state employment laws; will also remove redundant language within Personnel Ordinance section of the County Code
Employee Engagement Initiative - In Spring of 2021, all Departments set goals and created action plans focused on identified areas of opportunity	Human Resources-wide initiative to better communicate about our services and make accessing our resources simpler for our customers (County staff)
Benefits Transformation Initiative - Implementation of this initiative will move the County from transactional benefits administration to strategically managed benefits delivery	Employees and plan participants will access employee benefit information through a new “benefits hub” hosted by a third party administrator. This county-branded solution will provide centralized benefit portal with 24/7 access including online enrollment and instant confirmation, navigation to other employee benefit plans, and in-depth information relevant to the user, covered dependents and retirees.

End of Presentation

Thank you



Department Mission

PURPOSE STATEMENT: 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 43.0				
Total Proposed \$76,272,586				
General Fund Support \$ 1,299,995				
Administration Evelyn Minor-Lawrence, Director Total Proposed \$1,768,782 Gen Fund \$ 429,997	Employee & Labor Relations Eric Sarha, Deputy Director/Chief Negotiator Total Proposed \$808,125 Gen Fund \$ 217,500	Workforce Design Evelyn Minor-Lawrence, Director Total Proposed \$2,486,792 Gen Fund \$ 652,498	Benefits, Wellness, Leave Management Kristi Durham, Benefits Manager Total Proposed \$53,015,083 Gen Fund \$ -	Risk & Safety Management Eric Machado, Risk Manager Total Proposed \$18,193,804 Gen Fund \$ -
Office of the Director/ Administrative Svcs Evelyn Minor-Lawrence, Director FTE 5.0 Total Proposed \$948,340 Gen Fund \$ 212,498	Employee & Labor Relations Eric Sarha, Assistant Director/Chief Negotiator FTE 2.5 Total Proposed \$808,125 Gen Fund \$ 217,500	Classification & Compensation Heather Pedersen, Class & Comp Manager FTE 4.0 Total Proposed \$878,893 Gen Fund \$ 217,499	Benefits Administration Kristi Durham, Benefits Manager FTE 11.2 Total Proposed \$4,637,865 Gen Fund \$ -	Risk Administration Eric Machado, Risk Manager FTE 8.8 Total Proposed \$1,809,414 Gen Fund \$ -
Workforce Data Management Le Huynh, HR Business Systems Manager FTE 4.5 Total Proposed \$820,442 Gen Fund \$ 217,499		Recruitment and Selection JJ Peters, Recruitment Manager FTE 5.0 Total Proposed \$923,576 Gen Fund \$ 217,500	Medical Insurance Kristi Durham, Benefits Manager FTE 0.0 Total Proposed \$42,114,369 Gen Fund \$ -	Casualty/Liability Eric Machado, Risk Manager FTE 0.0 Total Proposed \$12,446,279 Gen Fund \$ -
		Workforce Development & Planning Kim Lignore, Learning & Development Manager FTE 2.0 Total Proposed \$684,323 Gen Fund \$ 217,499	Dental Insurance Kristi Durham, Benefits Manager FTE 0.0 Total Proposed \$4,158,974 Gen Fund \$ -	Workers' Compensation Eric Machado, Risk Manager FTE 0.0 Total Proposed \$3,470,774 Gen Fund \$ -
			Disability Insurance Kristi Durham, Benefits Manager FTE 0.0 Total Proposed \$1,273,366 Gen Fund \$ -	Unemployment Eric Machado, Risk Manager FTE 0.0 Total Proposed \$467,337 Gen Fund \$ -
			EAP/Wellness Kristi Durham, Benefits Manager FTE 0.0 Total Proposed \$823,027 Gen Fund \$ -	
			Deferred Compensation Kristi Durham, Benefits Manager FTE 0.0 Total Proposed \$7,482 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 budgetarily within the department.



Human Resources Department (16)

Department Budget Summary by Fund

Line of Business		FY 21/22	FY 21/22	FY 21/22	FY 21/22	FY 21/22	FY 21/22
Program		Prog#	FTE	General Fund	Self - Insurance Fund	Risk Management Claims Fund	Total Proposed Budget
Administration							
Director's Office/Administrative Services	160101	5.0	948,340				948,340
Workforce Data Management	160102	4.5	820,442				820,442
Employee & Labor Relations Management							
Employee and Labor Relations	160202	2.5	808,125				808,125
Workforce Design							
Classification and Compensation	160302	4.0	878,893				878,893
Recruitment and Selection	160303	5.0	923,576				923,576
Workforce Development and Planning	160304	2.0	684,323				684,323
Benefits, Wellness, Leave Management							
Benefits Administration	160401	11.2			4,637,865		4,637,865
Medical Insurance	160402				42,114,369		42,114,369
Dental Insurance	160403				4,158,974		4,158,974
Disability Insurance	160404				1,273,366		1,273,366
Employee Assistance Program/Wellness	160405				823,027		823,027
Deferred Compensation	160406				7,482		7,482
Risk & Safety Management							
Risk Administration	160501	8.8				1,809,414	1,809,414
Casualty/Liability	160502					12,446,279	12,446,279
Workers' Compensation	160503					3,470,774	3,470,774
Unemployment	160504					467,337	467,337
TOTAL		43.0	5,063,699	53,015,083	18,193,804	76,272,586	1,299,995
FY 20/21 Budget		43.0	4,940,449	49,015,767	18,306,755	72,262,971	1,192,986
\$ Increase (Decrease)		0.0	123,250	3,999,316	-112,951	4,009,615	107,009
% Increase (Decrease)		0.0%	2.5%	8.2%	-0.6%	5.5%	9.0%

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



Administration

Office of the Director/Administrative Services

Purpose Statement

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

Performance Narrative Statement

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.

Internal Complaint Process

In response to a comprehensive audit of the County's practices related to Internal Complaints by the 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 21/22.

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result	By 2021, 90% of Clackamas County managers agree or strongly agree that Human Resources is a strategic business partner.	91%	90%	90%	92%	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%	80%	80%	96%	80%
Output	Number of revised Employee Policies and Procedures and County Code.	0	10	12	5	10
Output (NEW)	Number of Internal Complaints investigated per fiscal year.	n/a	n/a	10	7	10

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.

In addition to the five (5) COVID related-policies cited in the Output measure above, 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.

The number of employee complaints is trending higher than the anticipated target, despite the pandemic remote work arrangements.

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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	0%
Federal, State, Local, All Other Gifts & Donations	-	9,241	-	-	-	-	0%
Charges, Fees, License, Permits, Fines, Assessments	3,144,685	3,748,102	3,747,463	3,747,463	735,843	(3,011,620)	-80.4%
All Other Revenue Resources	-	-	-	-	-	-	0%
General Fund Support	861,996	517,644	1,192,986	1,148,786	212,498	(980,488)	-82.2%
Operating Revenue	4,006,681	4,274,987	4,940,449	4,896,249	948,341	(3,992,108)	-80.8%
Total Revenue	4,006,681	4,274,987	4,940,449	4,896,249	948,341	(3,992,108)	-80.8%
Personnel Services	3,213,507	3,505,671	3,635,506	3,684,411	586,053	(3,049,453)	-83.9%
Materials & Services	792,881	769,316	1,304,943	1,211,838	362,288	(942,655)	-72.2%
Capital Outlay	293	-	-	-	-	-	0%
Operating Expense	4,006,681	4,274,987	4,940,449	4,896,249	948,341	(3,992,108)	-80.8%
Total Expense	4,006,681	4,274,987	4,940,449	4,896,249	948,341	(3,992,108)	-80.8%
Revenues Less Expenses	-	-	-	-	-	-	

Significant Issues and Changes

FY1 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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:

Workforce Data Management has two major initiatives in addition to the day-to-day transaction processing, system maintenance, and data quality work.

ERP Strategic Planning

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

Data Analytics

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

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

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result	95% of departments submitting Personnel Actions not needing material corrections.	88%	95%	95%	85%	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	n/a	80%	81%	80%
Output	Number of data transactions provided	14,178	9,000	9,000	9,668	9,000
Output (NEW)	Number of Employee Self Service password resets.	n/a	n/a	400	1,591	400
Output (NEW)	Number of HR system enhancements.	n/a	n/a	10	23	10
Output (NEW)	Number of HR business process improvements.	n/a	n/a	10	14	10
Output	Number of Managers and staff trained (removed)		60	Discontinue	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 only 85% of transactions submitted to Human Resources is correct. One way to address the 15% of transactions that are incorrect is to provide training for all the tools available to aid this process. We created a specific series of training courses for PA Processors and managers that we have delivered since fiscal year 16/17. The new training improved transaction quality approximately 20%, but has plateaued. Our goal for the FY 21/22 year is to add specific training for the PA Processors to continue to educate them in the accurate processing of employee transactions. We hope to improve our numbers of PA's not needing material corrections to 95% for the fiscal year 21/22.

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



Administration

Workforce Data Management

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	0%
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	602,943	602,943	0%
All Other Revenue Resources	-	-	-	-	-	-	0%
General Fund Support	-	-	-	-	217,499	217,499	0%
Operating Revenue	-	-	-	-	820,442	820,442	0%
Total Revenue	-	-	-	-	820,442	820,442	0%
Personnel Services	-	-	-	-	658,653	658,653	0%
Materials & Services	-	-	-	-	161,789	161,789	0%
Operating Expense	-	-	-	-	820,442	820,442	0%
Total Expense	-	-	-	-	820,442	820,442	0%
Revenues Less Expenses	-	-	-	-	-	-	

Significant Issues and Changes

FY1 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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 Peace Officers Association for their contract ending June 30, 2020, as well in negotiations with the Employees' Association for their three (3) contracts (Main, Part-time/Temporary and Housing Authority) ending June 30 2021. Negotiations are slated to begin shortly with American Federation of State County and Municipal Employees (AFSCME) for their three (3) contracts (WES, DTD and CCOM) also ending June 30, 2021. We will also begin to bargain the implementation of the County's findings related to the Equal Pay Audit.

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 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	n/a	90%	100%	90%
Result (NEW)	90% of managers/supervisors/will have E&LR training biannually.	n/a	n/a	90%	0%	90%
Output	Number of collective bargaining agreements and/or other labor agreements negotiated to resolution.	5	7	7	58	7
Output (NEW)	Number of managers and supervisors completing employee/labor relations training courses.	n/a	n/a	80	0	80
Output (NEW)	Number of corrective actions involving written reprimand and above vetted with E&LR before imposing.	n/a	n/a	14	10	14
Result	80% of grievances resolved prior to arbitration	Discontinue	65%	Discontinue	n/a	n/a
Output	Number of disciplinary actions involving economic loss	Discontinue	18	Discontinue	n/a	n/a
Output	Number of implemented performance improvement plans, work plans and/or other similar performance management related tools	Discontinue	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.

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



Employee and Labor Relations

Employee and Labor Relations

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	590,625	590,625	-
General Fund Support	-	-	-	-	217,500	217,500	-
Operating Revenue	-	-	-	-	808,125	808,125	-
Total Revenue	-	-	-	-	808,125	808,125	-
Personnel Services	-	-	-	-	603,835	603,835	-
Materials & Services	-	-	-	-	204,290	204,290	-
Capital Outlay	-	-	-	-	-	-	-
Operating Expense	-	-	-	-	808,125	808,125	-
Total Expense	-	-	-	-	808,125	808,125	-
Revenues Less Expenses	-	-	-	-	-	-	-
Significant Issues and Changes							

FYI 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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.

The Equal Pay Analysis was kicked off in February of 2019. In January 2021, the consultant presented a preliminary report with high level findings, with the final report and employee pay analysis expected in March 2021. Phase 2 of this project will include the review of the consultant's will recommend modifications to County compensation structures, systems, policies and to individual compensation to eliminate any unlawful wage disparities. County policies and practices related to classification and compensation will be reviewed and revised 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. This information will be used consistently for all recruitments so that employees hired into any position within the same classification will be held to the same Minimum Qualification.

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 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.	14%	20%	20%	18%	20%
Result (NEW)	By 2025, County Departments will have access to tools and data necessary to support hiring decisions.	n/a	n/a	20%	n/a	20%
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	n/a	n/a	n/a
Output	Number of position allocations, recommendations and determinations provided.	259	250	250	124	250
Output	Number of market studies conducted (individual classifications and job families).	99	70	50	15	50
Output (NEW)	Number of new or revised classification specifications.	n/a	n/a	12	24	12
Output (NEW)	Number of Equal Pay Analysis recommendations.	n/a	n/a	n/a	n/a	n/a

Performance Measures Narrative:

We continue to work toward our goal of ensuring that all County classifications have been reviewed and are market competitive. In addition, Classification and Compensation established a number of new measures effective July 1, 2020, which are currently in place, but we do not yet have adequate results data at this time.

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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	661,394	661,394	-
General Fund Support	-	-	-	-	217,499	217,499	-
Operating Revenue	-	-	-	-	878,893	878,893	-
Total Revenue	-	-	-	-	878,893	878,893	-
Personnel Services	-	-	-	-	716,104	716,104	-
Materials & Services	-	-	-	-	162,789	162,789	-
Operating Expense	-	-	-	-	878,893	878,893	-
Total Expense	-	-	-	-	878,893	878,893	-
Revenues Less Expenses	-	-	-	-	-	-	-

Significant Issues and Changes

FY1 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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:

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 determining salary placement to fully implement the Equal Pay Act.

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

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result	70% of open positions are filled within 90 days from the date of requisition	55%	38%	65%	46%	65%
Output	Number of hires per year	358	259	320	122	320
Output	Number of job postings (recruitments) per year	305	211	260	94	260
Output	Number of recruitment outreach events per year	28	18	24	8	24

Performance Measures Narrative:

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

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.

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

original job requisition was created in order to capture the data more accurately. The prior business processes needed to be changed because they did not accurately capture the actual time it took to fill these vacancies.

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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	706,076	706,076	-
General Fund Support	-	-	-	-	217,500	217,500	-
Operating Revenue	-	-	-	-	923,576	923,576	-
Total Revenue	-	-	-	-	923,576	923,576	-
Personnel Services	-	-	-	-	811,787	811,787	-
Materials & Services	-	-	-	-	111,789	111,789	-
Operating Expense	-	-	-	-	923,576	923,576	-
Total Expense	-	-	-	-	923,576	923,576	-
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:

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

- **Performance Feedback:** The County's performance feedback process, Clarify, Converse, Capture, has been in place for two years and we have seen major progress. Prior to putting this framework in place in 2018, less than 40% of employees received reviews. By FY 19/20, this number had increased to 86%. FY 20/21 has been more challenging with the pandemic and we have seen a slight decrease. This is a major culture change for the County and will continue to require ongoing attention and enhancements. In FY 20/21, we updated the intranet, finalized our EPP and trained over 150 new employees on the process upon their transition to the County. In FY 21/22, we will continue to move the performance feedback framework forward with enhancements and training and assess the alignment with EPA recommendations.

- **Employee Engagement:** In FY 20/21, partnered with TalentMap to successfully launch our first County-wide employee engagement survey. We shared County-wide results with all staff, held facilitated sessions with Department leadership teams and led the County in ensuring Departments shared results with all staff. In Spring of 2021, all Departments will set goals and create action plans focused on identified areas of opportunity. We have communicated to key stakeholders including the EMT and union leaders, along the way. In FY 21/22, we will rollout our second engagement survey with TalentMap, incorporating best practices from first survey in a more deliberate and timely phased approach.

- **Workforce Planning:** Meeting departments where they are at with Workforce Planning will continue to be a focus in FY 21/22. We will connect with the 59% of departments that already have workforce planning elements included in their strategic business plans to determine how best to support them.

- **Learning and Development:** During FY 21/22, Partner closely with Equity and Inclusion Office to design and develop foundational, custom learning for all employees and supervisors/managers. Integrate learning into new employee workshop, new supervisory training. Apply equity lens to all learning programs.

- Continue to create and market a broader range of learning resources, virtual and in-person, including a virtual platform with resources for supervisors/managers in partnership with Learning Point. In addition, our renewed eLearning library contract with Provisions will provide more capability, including the ability to load our own custom content.

- Identify core competencies for managers through research, assessment and interaction with stakeholders. These standards will better enable the development of training, the establishment of positions and holding employees accountable for this portion of their work and begin to create a learning curriculum to support these competencies. Curriculum will integrate Clarify Converse Capture, Core Values, employee engagement and core supervisory expectations.

- Create a more engaging experience for new employees and new supervisors/managers at the County by enhancing current programs and ensuring audience groups have the right content to set them up for success at the County and in their roles.

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 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	n/a	50%	25%	50%
Result	90% of Learning & Development participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time.	93%	95%	90%	90%	90%
Result	90% of employees will have a documented summary of performance at least annually.	77%	86%	90%	68%	90%
Output (NEW)	Number of Workforce planning consultations.	n/a	n/a	n/a	9	n/a
Output	Number of County employees engaged in learning events.	2737	2000	2000	3816	2000
Output (NEW)	Number of employees with a documented summary of performance each year.	n/a	n/a	n/a	1392	n/a
Output	Number of workforce plans developed	Discontinue	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	59%	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.

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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	466,824	466,824	-
General Fund Support	-	-	-	-	217,499	217,499	-
Operating Revenue	-	-	-	-	684,323	684,323	-
Total Revenue	-	-	-	-	684,323	684,323	-
Personnel Services	-	-	-	-	402,534	402,534	-
Materials & Services	-	-	-	-	281,789	281,789	-
Operating Expense	-	-	-	-	684,323	684,323	-
Total Expense	-	-	-	-	684,323	684,323	-
Revenues Less Expenses	-	-	-	-	-	-	-
Significant Issues and Changes							

FY1 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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

Starting in June 2020, we worked with outside consultants and engaged in extensive discovery over 8 months, including conducting focus groups with stakeholders. This resulted in final recommendations for implementation of the Benefits Service Delivery Strategy.

The RFP for "Benefit Administration Consultant for Transformation and Implementation Strategies" has been posted and closes March 24, 2021. Work will continue through FY 21-22:

- 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 20/21 Additional Benefits, Leave, and Wellness efforts:

- RFP, vendor selection, and contracts awarded for two major vendors: Benefits Broker and Deferred Compensation Plan Recordkeeper
- Implemented FFCRA and other COVID-19 related leave
- Implemented employee benefit plan options and mandates resulting from COVID-19 relief legislation
- Facilitated employee groups providing support and resources for wildfire impacts, parents, caregivers, and employees of color

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result (NEW)	80% of employees return to work within 90 days of initial non-occupational short-term disability.	n/a	n/a	80%	*	80%
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%	90%
Result (NEW)	Annual alignment of wellness programs with workforce need.	n/a	n/a	20%	*	20%
Output (NEW)	Number of medical leave requests.	n/a	n/a	262	527	262
Output (NEW)	Number of Wellness Program class participants.	n/a	n/a	100	*	100
Output (NEW)	Number of enrollment changes.	n/a	n/a	1980	5245	5245
Result	90% of Wellness class surveys indicate "agree" or "strongly agree" that the class contributes to well-being	96%	97%	Discontinue	n/a	n/a
Result	90% of Expected/Open Leave Cases in PeopleSoft HR are accurate	89%	100%	Discontinue	n/a	n/a
Result	80% of employees return to work within 180 days of initial non-occupational disability claim	86%	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.

* These results will be measured for the full fiscal year on June 30, 2021. The return-to-work within 180 days result was met in FY 19-20, so we increased the goal to 90 days for FY 20-21.

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

Program includes:

Mandated Services	<input type="checkbox"/> Y
Shared Services	<input type="checkbox"/> N
Grant Funding	<input type="checkbox"/> 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.
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Benefits and Wellness

Benefits Administration

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	390,982	1,076,135	3,166,081	2,883,320	2,581,810	(584,271)	-18.5%
Federal, State, Local, All Other Gifts & Donations	-	2,563	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	3,537,199	3,614,381	1,828,813	1,889,272	1,902,955	74,142	4.1%
All Other Revenue Resources	166,547	199,443	45,295	325,902	153,100	107,805	238.0%
Operating Revenue	3,703,746	3,816,387	1,874,108	2,215,174	2,056,055	181,947	9.7%
Total Revenue	4,094,728	4,892,522	5,040,189	5,098,494	4,637,865	(402,324)	-8.0%
Personnel Services	1,584,032	1,557,973	1,687,370	1,613,584	1,767,084	79,714	4.7%
Materials & Services	434,561	451,229	582,352	903,100	958,667	376,315	64.6%
Operating Expense	2,018,593	2,009,202	2,269,722	2,516,684	2,725,751	456,029	20.1%
Contingency	-	-	8,934,575	-	1,912,114	(7,022,461)	-78.6%
Total Expense	2,018,593	2,009,202	11,204,297	2,516,684	4,637,865	(6,566,432)	-58.6%
Revenues Less Expenses	2,076,135	2,883,320	(6,164,108)	2,581,810	-	6,164,108	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.

Implementation of Benefits Transformation which will move the County from transactional benefits administration to strategically managed benefits delivery.



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 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Output (NEW)	Number of enrollment changes.	n/a	n/a	1980	5245	5245

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

Medical Insurance

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	3,252,008	8,684,900	10,975,907	11,940,003	13,146,807	2,170,900	19.8%
Federal, State, Local, All Other Gifts & Donations	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	-	-	-
All Other Revenue Resources	26,328,057	27,363,855	27,302,655	28,247,373	28,967,562	1,664,907	6.1%
Operating Revenue	26,328,057	27,363,855	27,302,655	28,247,373	28,967,562	1,664,907	6.1%
Total Revenue	29,580,065	36,048,755	38,278,562	40,187,376	42,114,369	3,835,807	10.0%
Materials & Services	23,895,165	24,108,752	32,293,620	27,040,569	33,572,643	1,279,023	4.0%
Operating Expense	23,895,165	24,108,752	32,293,620	27,040,569	33,572,643	1,279,023	4.0%
Reserve for Future Expenditures	-	-	2,120,600	-	2,162,700	42,100	2.0%
Contingency	-	-	-	-	6,379,026	6,379,026	-
Total Expense	23,895,165	24,108,752	34,414,220	27,040,569	42,114,369	7,700,149	22.4%
Revenues Less Expenses	5,684,900	11,940,003	3,864,342	13,146,807	-	(3,864,342)	

Significant Issues and Changes

FY1 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



Benefits and Wellness

Dental Insurance

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target

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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	2,822,675	1,100,918	1,385,469	1,488,578	1,718,528	333,059	24.0%
All Other Revenue Resources	2,359,107	2,320,657	2,407,092	2,440,445	2,440,446	33,354	1.4%
Operating Revenue	2,359,107	2,320,657	2,407,092	2,440,445	2,440,446	33,354	1.4%
Total Revenue	5,181,782	3,421,575	3,792,561	3,929,023	4,158,974	366,413	9.7%
Personnel Services	-	-	-	-	-	-	-
Materials & Services	2,080,865	1,932,997	2,444,095	2,210,495	2,431,706	(12,389)	-0.5%
Operating Expense	2,080,865	1,932,997	2,444,095	2,210,495	2,431,706	(12,389)	-0.5%
Reserve for Future Expenditures	-	-	255,700	-	255,700	-	0%
Contingency	-	-	-	-	1,471,568	1,471,568	-
Total Expense	2,080,865	1,932,997	2,699,795	2,210,495	4,158,974	1,459,179	54.0%
Revenues Less Expenses	3,100,917	1,488,578	1,092,766	1,718,528	-	(1,092,766)	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result (NEW)	80% of employees return to work within 90 days of initial non-occupational short-term disability.	n/a	n/a	80%	*	80%
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%	90%
Output (NEW)	Number of medical leave requests.	n/a	n/a	262	527	262

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

Disability Insurance

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	694,511	770,994	805,858	833,180	973,566	167,708	20.8%
All Other Revenue Resources	275,188	293,393	293,249	299,370	299,800	6,551	2.2%
Operating Revenue	275,188	293,393	293,249	299,370	299,800	6,551	2.2%
Total Revenue	969,699	1,064,387	1,099,107	1,132,550	1,273,366	174,259	15.9%
Materials & Services	198,705	231,207	463,564	158,984	426,135	(37,429)	-8.1%
Operating Expense	198,705	231,207	463,564	158,984	426,135	(37,429)	-8.1%
Reserve for Future Expenditures	-	-	58,252	-	58,252	-	0%
Contingency	-	-	-	-	788,979	788,979	-
Total Expense	198,705	231,207	521,816	158,984	1,273,366	751,550	144.0%
Revenues Less Expenses	770,994	833,180	577,291	973,566	-	(577,291)	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result (NEW)	Annual alignment of wellness programs with workforce need.	n/a	n/a	20%	*	20%
Output (NEW)	Number of Wellness Program class participants.	n/a	n/a	100	*	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



Benefits and Wellness

Employee Assistance Program/Wellness

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	578,384	610,869	626,261	627,630	654,577	28,316	4.5%
Charges, Fees, License, Permits, Fines, Assessments	82,279	84,161	84,530	85,278	84,000	(530)	-0.6%
All Other Revenue Resources	78,320	80,462	85,725	82,148	84,450	(1,275)	-1.5%
Operating Revenue	160,599	164,623	170,255	167,426	168,450	(1,805)	-1.1%
Total Revenue	738,983	775,492	796,516	795,056	823,027	26,511	3.3%
Personnel Services	-	-	-	-	-	-	0%
Materials & Services	128,114	147,862	168,889	140,479	168,450	(439)	-0.3%
Operating Expense	128,114	147,862	168,889	140,479	168,450	(439)	-0.3%
Contingency	-	-	-	-	654,577	654,577	-
Total Expense	128,114	147,862	168,889	140,479	823,027	654,138	387.3%
Revenues Less Expenses	610,869	627,630	627,627	654,577	-	(627,627)	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



Benefits and Wellness

Deferred Compensation

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
	n/a					

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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	4,102	2,082	2,082	2,082	2,082	-	0%
All Other Revenue Resources	-	2,004	6,750	100	5,400	(1,350)	-20.0%
Operating Revenue	-	2,004	6,750	100	5,400	(1,350)	-20.0%
Total Revenue	4,102	4,086	8,832	2,182	7,482	(1,350)	-15.3%
Materials & Services	2,020	2,004	6,750	100	5,400	(1,350)	-20.0%
Operating Expense	2,020	2,004	6,750	100	5,400	(1,350)	-20.0%
Contingency	-	-	-	-	2,082	2,082	-
Total Expense	2,020	2,004	6,750	100	7,482	732	10.8%
Revenues Less Expenses	2,082	2,082	2,082	2,082	-	(2,082)	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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 eliminate risk, sustain a healthy and productive workforce and preserve financial resources.

Performance Narrative Statement

Major Initiatives:

COVID-19 pandemic risk and safety response and management

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

Continue optimization of an updated RMIS system went live in the fall of 2019

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

Workplace Violence Prevention Team

As the County workforce returns more regularly to the office, this initiative will ramp up and support EPP #34.

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result (NEW)	Clackamas County will maintain a workers' compensation rating below the state's industry average.	0.76	0.71	Below 1	0.71	Below 1
Result (NEW)	By 2025, all classification specifications will contain risk management responsibilities.	n/a	0.46	Below 1	0.18	Below 1
Result (NEW)	By 2025, departments will have access to real time risk management data (examples: injury trends, claim expenses).	n/a	n/a	20%	20%	50%
Output	Number of ergonomic assessments provided quarterly	40	20	25	10	25
Output (NEW)	Number of liability claims.	n/a	n/a	30	40	30
Output	Number of workers' compensation claims processed quarterly	29	28	30	40	30
Output (NEW)	Number of unemployment claims.	n/a	n/a	120	273	200
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	Discontinue	n/a	n/a	n/a
Results	Experience Modification Rate will be 1 or less	n/a	1 or less	Discontinue	n/a	n/a
Results	Each year the ratio of liability claims paid, when compared to the actuarial recommendation is 1 or less	n/a	1 or less	Discontinue	n/a	n/a

Performance Measures Narrative:

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

In a similar vein, the 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.

We are working with the Classification and Compensation division to get class specs that will have risk management responsibilities in the supervisor and manager groups. This will further embed risk management into the organization.

The "Outputs" are broken down into four categories;

-Ergonomics, liability claims processed, workers' compensation claims processes and unemployment claims processed. Huge increase in unemployment claims 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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	252,764	233,511	208,607	-	12,262	(196,345)	-94.1%
Federal, State, Local, All Other Gifts & Donations	-	12,328	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	1,436,190	-	1,505,852	1,530,111	1,628,709	122,857	8.2%
All Other Revenue Resources	-	167,474	-	167,474	168,443	168,443	-
Operating Revenue	1,688,954	413,313	1,714,459	1,697,585	1,809,414	291,300	5.5%
Total Revenue	1,688,954	413,313	1,714,459	1,697,585	1,809,414	94,955	5.5%
Personnel Services	957,189	1,124,624	1,449,212	1,436,061	1,486,264	37,052	2.6%
Materials & Services	286,523	243,870	252,985	249,262	260,888	7,903	3.1%
Operating Expense	1,243,712	1,368,494	1,702,197	1,685,323	1,747,152	44,955	2.6%
Contingency	-	-	12,262	-	62,262	50,000	407.8%
Total Expense	1,243,712	1,368,494	1,714,459	1,685,323	1,809,414	94,955	5.5%
Revenues Less Expenses	445,242	(955,181)	-	12,262	-	-	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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 claims funding
- Casualty/Liability claims management
- Liability (excess), cyber, public officials, volunteer and property insurance policies
- Contract risk language reviews

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Output (NEW)	Number of liability claims.	n/a	n/a	30	40	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

Casualty/Liability

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	9,533,753	10,081,438	10,708,831	10,610,071	10,288,026	(420,805)	-3.9%
Charges, Fees, License, Permits, Fines, Assessments	2,216,181	3,176,426	2,206,075	2,250,294	1,983,253	(222,822)	-10.1%
All Other Revenue Resources	346,312	160,531	175,000	175,000	175,000	-	0%
Operating Revenue	2,562,493	3,336,957	2,381,075	2,425,294	2,158,253	(222,822)	-9.4%
Total Revenue	12,096,246	13,418,395	13,089,906	13,035,365	12,446,279	(643,627)	-4.9%
Materials & Services	1,809,423	1,853,142	2,324,716	1,747,339	2,154,262	(170,454)	-7.3%
Transfers	-	-	1,000,000	1,000,000	-	(1,000,000)	-100.0%
Operating Expense	1,809,423	1,853,142	3,324,716	2,747,339	2,154,262	(1,170,454)	-35.2%
Reserve for Future Expenditures	-	-	1,385,852	-	6,625,000	5,239,148	378.0%
Contingency	-	-	8,379,338	-	3,667,017	(4,712,321)	-56.2%
Total Expense	1,809,423	1,853,142	13,089,906	2,747,339	12,446,279	(643,627)	-4.9%
Revenues Less Expenses	10,286,823	11,565,253	-	10,288,026	-	-	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Result (NEW)	Clackamas County will maintain a workers' compensation rating below the state's industry average.	0.76	0.71	Below 1	0.71	Below 1
Output	Number of workers' compensation claims processed quarterly	29	28	30	40	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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	1,994,720	2,194,305	2,023,280	2,588,377	2,277,736	254,456	12.6%
Charges, Fees, License, Permits, Fines, Assessments	1,079,780	1,784,998	1,133,769	1,024,595	1,193,038	59,269	5.2%
Operating Revenue	3,074,500	3,979,303	3,157,049	3,612,972	3,470,774	313,725	9.9%
Total Revenue	3,074,500	3,979,303	3,157,049	3,612,972	3,470,774	313,725	9.9%
Materials & Services	1,296,815	1,390,926	1,176,000	1,335,236	1,246,000	70,000	6.0%
Operating Expense	1,296,815	1,390,926	1,176,000	1,335,236	1,246,000	70,000	6.0%
Reserve for Future Expenditures	-	-	1,735,454	-	1,735,000	(454)	0.0%
Contingency	-	-	245,595	-	489,774	244,179	99.4%
Total Expense	1,296,815	1,390,926	3,157,049	1,335,236	3,470,774	313,725	9.9%
Revenues Less Expenses	1,777,685	2,588,377	-	2,277,736	-	-	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.



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 unemployment costs

Key Performance Measures

		FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actuals as of 12/31/20	FY 21-22 Target
Output (NEW)	Number of Unemployment Claims.	n/a	n/a	120	273	200

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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	177,637	174,237	170,341	170,837	167,337	(3,004)	-1.8%
Charges, Fees, License, Permits, Fines, Assessments	131,549	180,528	175,000	300,000	300,000	125,000	71.4%
Operating Revenue	131,549	180,528	175,000	300,000	300,000	125,000	71.4%
Total Revenue	309,186	354,765	345,341	470,837	467,337	121,996	35.3%
Materials & Services	135,444	183,928	178,400	303,500	303,800	125,400	70.3%
Operating Expense	135,444	183,928	178,400	303,500	303,800	125,400	70.3%
Contingency	-	-	166,941	-	163,537	(3,404)	-2.0%
Total Expense	135,444	183,928	345,341	303,500	467,337	121,996	35.3%
Revenues Less Expenses	173,742	170,837	-	167,337	-	-	

Significant Issues and Changes

FY 21-22: Presentation changes are the result of the new county-wide chart of account implementation.