

Human Resources

Budget Presentation
Fiscal Year 2025-2026





Human Resources Department (16)

Department Budget Summary by Fund

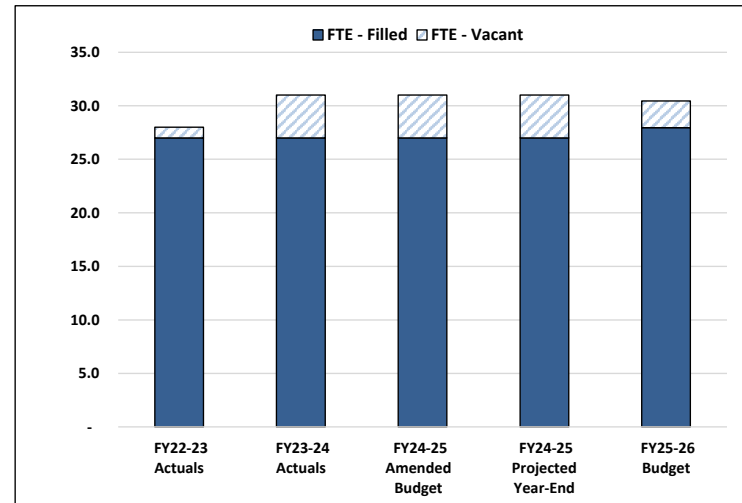
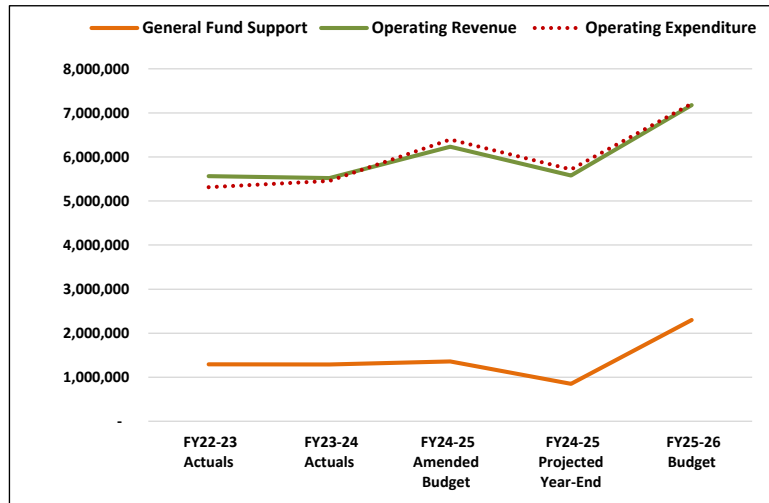
Line of Business	Program	FY25-26 General Fund (100)	FY25-26 Self-Insurance Fund (760)	FY25-26 Risk Mgmt Claims Fund (761)	FY25-26 Total Budget	FY25-26 General Fund Support in Budget*	% of Total	FY25-26 FTE **		
								Total	Filled	Vacant
Administration	Director's Office	1,038,062			1,038,062	153,180	15%	4.7	4.7	-
	HR Information Systems	1,639,765			1,639,765	668,823	41%	5.5	4.5	1.0
Employee & Labor Relations Management	Employee & Labor Relations	844,346			844,346	241,095	29%	3.0	3.0	-
								-	-	-
Workforce Design	Classification & Compensation	1,197,206			1,197,206	288,390	24%	6.0	6.0	-
	Recruitment & Selection	1,825,623			1,825,623	670,797	37%	8.8	8.8	-
	Employee Engagement & Dev	663,024			663,024	276,291	42%	2.5	1.0	1.5
Benefits, Wellness, Leave Management								-	-	-
	Benefits Administration		4,228,192		4,228,192	-	0%	14.9	13.4	1.5
	Medical Insurance	-	51,632,682		51,632,682	-	0%	-	-	-
	Dental Insurance		4,708,922		4,708,922	-	0%	-	-	-
	Disability Insurance		2,032,335		2,032,335	-	0%	-	-	-
	EAP/Wellness		655,940		655,940	-	0%	-	-	-
Risk & Safety Management	Deferred Compensation		5,950		5,950	-	0%	-	-	-
								-	-	-
	Risk Administration			2,168,003	2,168,003	-	0%	9.2	9.2	-
	Casualty/Liability			11,795,285	11,795,285	-	0%	-	-	-
	Workers' Compensation			4,259,524	4,259,524	-	0%	-	-	-
	Unemployment			501,252	501,252	-	0%	-	-	-
TOTAL		7,208,026	63,264,021	18,724,064	89,196,111	2,298,576	3%	54.5	50.5	4.0
FY24-25 Budget (Amended)		6,394,579	66,034,361	18,760,880	91,189,820	1,360,000	1%	55.8	50.8	5.0
\$ Increase (Decrease)		813,447	(2,770,340)	(36,816)	(1,993,709)	938,576		1.3	0.3	1.0
% Increase (Decrease)		13%	-4%	0%	-2%	69%		-2%	0%	-20%

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

** FY25-26 FTE: The figures align to each department's updated personnel counts

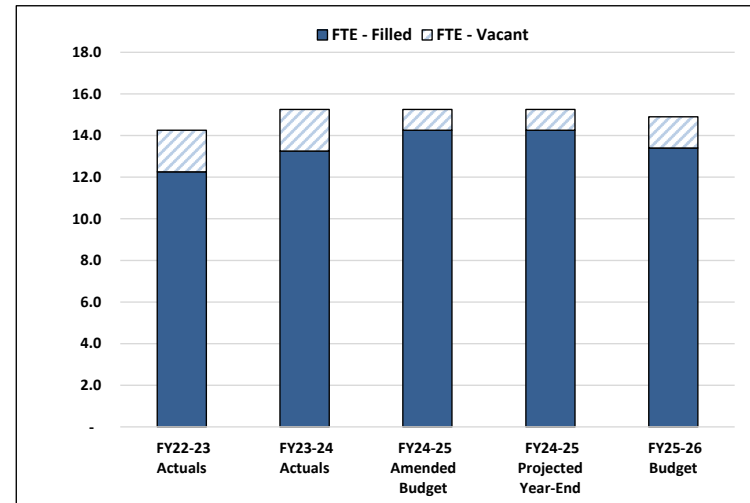
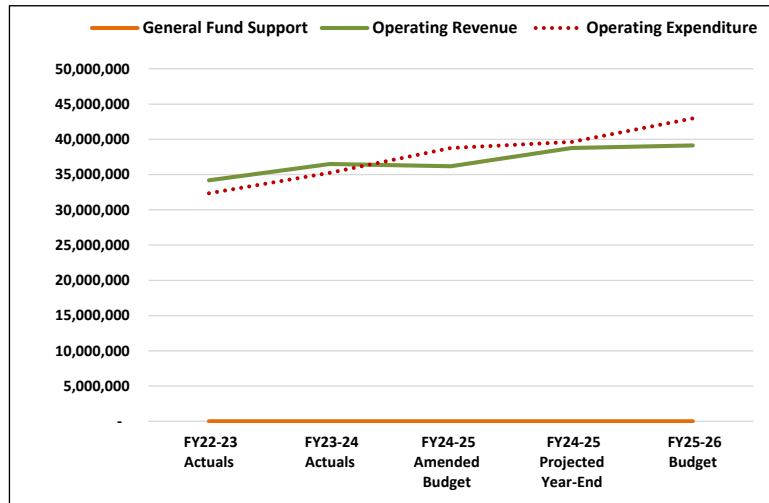
**16-Human Resources (HR) / 100-General Fund
Summary of Revenue and Expense**

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	<u>Budget to Budget:</u>		<u>Budget to 3-Year Average:</u>	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	103,644	100,000	164,351	164,352	29,144	(135,207)	-82%	(93,521)	-76%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits	4,054,670	4,054,105	4,036,077	4,036,077	4,204,523	168,446	4%	156,239	4%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	214,768	176,774	137,561	177,532	54,529	(83,032)	-60%	(135,162)	-71%
Other Interfund Transfers	-	-	696,590	514,285	621,254	(75,336)	-11%	449,826	262%
General Fund Support	1,292,705	1,289,097	1,360,000	851,463	2,298,576	938,576	69%	1,154,154	101%
Operating Revenue	5,562,143	5,519,976	6,230,228	5,579,357	7,178,882	948,654	15%	1,625,057	29%
Total Revenue	5,665,787	5,619,976	6,394,579	5,743,709	7,208,026	813,447	13%	1,531,535	27%
Personnel Services	4,461,655	4,830,311	5,468,031	4,767,026	5,750,706	282,675	5%	1,064,375	23%
Materials and Services	850,704	625,312	926,548	947,539	1,457,319	530,771	57%	649,467	80%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expenditure	5,312,359	5,455,623	6,394,579	5,714,565	7,208,025	813,446	13%	1,713,843	31%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Total Appropriated	5,312,359	5,455,623	6,394,579	5,714,565	7,208,025	813,446	13%	1,713,843	31%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	5,312,359	5,455,623	6,394,579	5,714,565	7,208,025	813,446	13%	1,713,843	
Revenues Less Expenses	353,428	164,352	-	29,144	-				
<u>Full Time Equivalent (FTE)</u> <i>As Of 03/2025</i>									
FTE - Total	28.0	31.0	31.0	31.0	30.5	(0.6)			
FTE - Filled	27.0	27.0	27.0	27.0	28.0	0.9			
FTE - Vacant	1.0	4.0	4.0	4.0	2.5	(1.5)			



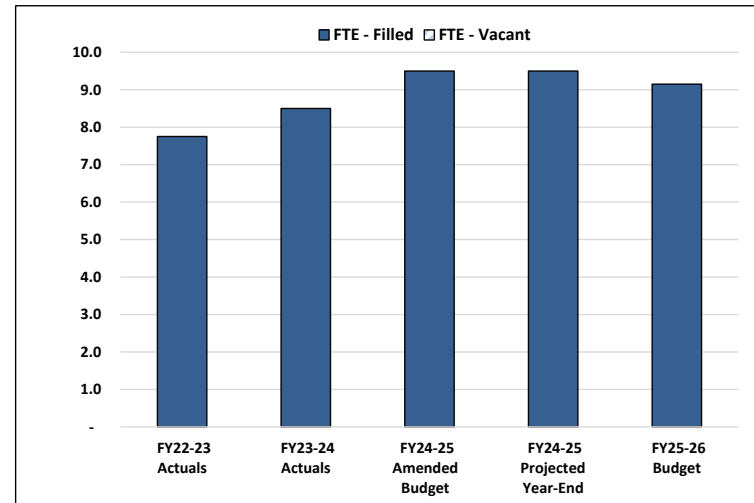
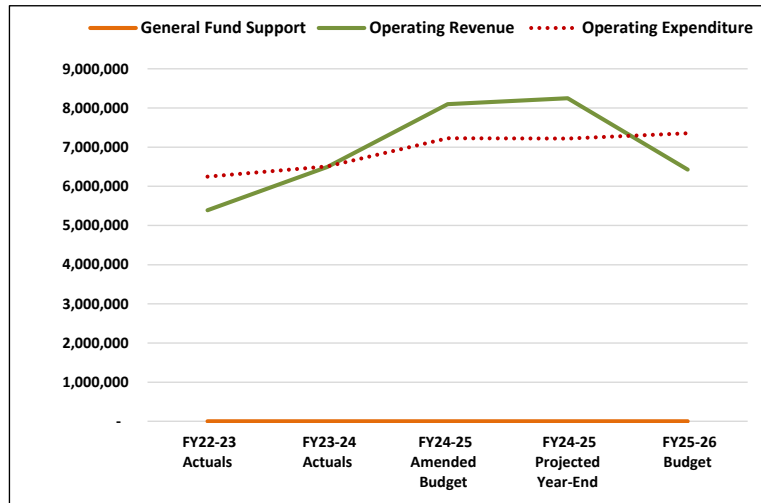
16-Human Resources (HR) / 760-Self-Insurance Fund
Summary of Revenue and Expense

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	<u>Budget to Budget:</u>		<u>Budget to 3-Year Average:</u>	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	24,597,171	26,447,188	29,853,323	27,700,530	24,136,738	(5,716,585)	-19%	(2,111,558)	-8%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits	2,007,487	2,129,603	2,144,596	2,164,263	2,071,826	(72,770)	-3%	(28,625)	-1%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	32,183,540	34,361,057	34,036,442	36,595,191	37,055,457	3,019,015	9%	2,675,528	8%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	34,191,026	36,490,660	36,181,038	38,759,454	39,127,283	2,946,245	8%	2,646,903	7%
Total Revenue	58,788,197	62,937,848	66,034,361	66,459,984	63,264,021	(2,770,340)	-4%	535,345	1%
Personnel Services	1,809,456	2,053,836	2,499,580	2,498,932	2,656,112	156,532	6%	535,371	25%
Materials and Services	30,531,553	33,183,482	36,257,365	37,127,724	40,312,238	4,054,873	11%	6,697,985	20%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expenditure	32,341,009	35,237,318	38,756,945	39,626,656	42,968,350	4,211,405	11%	7,233,356	20%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	2,696,590	2,696,590	621,254	(2,075,336)	-77%	(277,609)	-31%
Contingency	-	-	21,228,675	-	16,322,266	(4,906,409)	-23%	16,322,266	-
Total Appropriated	32,341,009	35,237,318	62,682,210	42,323,246	59,911,870	(2,770,340)	-4%	23,278,012	64%
Reserve for Future Expenditures	-	-	3,352,151	-	3,352,151	-	0%	3,352,151	-
Total Expense	32,341,009	35,237,318	66,034,361	42,323,246	63,264,021	(2,770,340)	-4%	26,630,163	
Revenues Less Expenses	26,447,188	27,700,530	-	24,136,738	-				
<u>Full Time Equivalent (FTE)</u> <u>As Of 03/2025</u>									
FTE - Total	14.3	15.3	15.3	15.3	14.9	(0.4)			
FTE - Filled	12.3	13.3	14.3	14.3	13.4	(0.9)			
FTE - Vacant	2.0	2.0	1.0	1.0	1.5	0.5			



16-Human Resources (HR) / 761-Risk Management Claims Fund
Summary of Revenue and Expense

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	<u>Budget to Budget:</u>		<u>Budget to 3-Year Average:</u>	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	12,135,003	11,280,066	10,660,880	11,268,501	12,299,064	1,638,184	15%	737,874	6%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits	5,190,837	6,076,976	6,000,000	6,000,000	6,225,000	225,000	4%	469,063	8%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	200,183	420,686	100,000	250,000	200,000	100,000	100%	(90,290)	-31%
Other Interfund Transfers	-	-	2,000,000	2,000,000	-	(2,000,000)	-100%	(666,667)	-100%
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	5,391,020	6,497,662	8,100,000	8,250,000	6,425,000	(1,675,000)	-21%	(287,894)	-4%
Total Revenue	17,526,024	17,777,728	18,760,880	19,518,501	18,724,064	(36,816)	0%	449,980	2%
Personnel Services	1,382,692	1,497,776	1,817,446	1,817,446	1,840,904	23,458	1%	274,933	18%
Materials and Services	4,863,265	5,011,451	5,412,032	5,401,991	5,515,464	103,431	2%	423,228	8%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expenditure	6,245,958	6,509,227	7,229,479	7,219,437	7,356,368	126,890	2%	698,161	10%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	7,861,401	-	7,677,696	(183,705)	-2%	7,677,696	-
Total Appropriated	6,245,958	6,509,227	15,090,880	7,219,437	15,034,064	(56,815)	0%	8,375,857	126%
Reserve for Future Expenditures	-	-	3,670,000	-	3,690,000	20,000	1%	3,690,000	-
Total Expense	6,245,958	6,509,227	18,760,880	7,219,437	18,724,064	(36,815)	0%	12,065,857	
Revenues Less Expenses	11,280,066	11,268,501	-	12,299,064	-				
Full Time Equivalent (FTE)									
				<i>As Of 03/2025</i>					
FTE - Total	7.8	8.5	9.5	9.5	9.2	(0.4)			
FTE - Filled	7.8	8.5	9.5	9.5	9.2	(0.4)			
FTE - Vacant	-	-	-	-	-	-			



FY25-26 Looking Ahead

CHALLENGES

Legislative, Regulatory updates, and Evolving Compliance Requirements:

- Updates to legislation, including changes to Oregon Paid Leave, the Equal Pay Act (EPA), revised I-9 requirements, and addressing unemployment due to labor disputes have increased the demand for HR services and support to assist county departments navigating compliance requirements.

Workforce Challenges:

- A competitive labor market presents challenges in attracting and retaining top talent.
- Increasing expenditures for Liability and Benefits insurance.
- Managing 8 Collective Bargaining agreements while addressing a growing number of complex labor issues.

Outdated Technology:

- HR technology systems have remained unchanged for 10+ years, creating a need for replacement or upgrades to our Human Resources Information Systems.

OPPORTUNITIES

Increased Efficiency with Technology:

- Migrating from an outdated system to a cloud-based records management system that stores employee personnel records.
- Implementing a new Workflow Approval system to address inefficiencies in manual processes in personnel.

Workforce Development:

- Utilizing market studies to effectively identify, attract, and retain top talent.
- Expanding education and skills training for Supervisors/Managers to increase overall competencies.

Strategic Sourcing:

- Outsourcing key functions such as COBRA administration, workplace investigations, and market studies for general positions.



Human Resources Department (16)

Department Budget Summary by Fund

Line of Business	Program	FY25-26 General Fund (100)	FY25-26 Self-Insurance Fund (760)	FY25-26 Risk Mgmt Claims Fund (761)	FY25-26 Total Budget	FY25-26 General Fund Support in Budget*	% of Total	FY25-26 FTE **		
								Total	Filled	Vacant
Administration	Director's Office	1,038,062			1,038,062	153,180	15%	4.7	4.7	-
	HR Information Systems	1,639,765			1,639,765	668,823	41%	5.5	4.5	1.0
Employee & Labor Relations Management	Employee & Labor Relations	844,346			844,346	241,095	29%	3.0	3.0	-
								-	-	-
Workforce Design	Classification & Compensation	1,197,206			1,197,206	288,390	24%	6.0	6.0	-
	Recruitment & Selection	1,825,623			1,825,623	670,797	37%	8.8	8.8	-
	Employee Engagement & Dev	663,024			663,024	276,291	42%	2.5	1.0	1.5
Benefits, Wellness, Leave Management								-	-	-
	Benefits Administration		4,228,192		4,228,192	-	0%	14.9	13.4	1.5
	Medical Insurance	-	51,632,682		51,632,682	-	0%	-	-	-
	Dental Insurance		4,708,922		4,708,922	-	0%	-	-	-
	Disability Insurance		2,032,335		2,032,335	-	0%	-	-	-
	EAP/Wellness		655,940		655,940	-	0%	-	-	-
Risk & Safety Management	Deferred Compensation		5,950		5,950	-	0%	-	-	-
								-	-	-
	Risk Administration			2,168,003	2,168,003	-	0%	9.2	9.2	-
	Casualty/Liability			11,795,285	11,795,285	-	0%	-	-	-
	Workers' Compensation			4,259,524	4,259,524	-	0%	-	-	-
	Unemployment			501,252	501,252	-	0%	-	-	-
TOTAL		7,208,026	63,264,021	18,724,064	89,196,111	2,298,576	3%	54.5	50.5	4.0
FY24-25 Budget (Amended)		6,394,579	66,034,361	18,760,880	91,189,820	1,360,000	1%	55.8	50.8	5.0
\$ Increase (Decrease)		813,447	(2,770,340)	(36,816)	(1,993,709)	938,576		1.3	0.3	1.0
% Increase (Decrease)		13%	-4%	0%	-2%	69%		-2%	0%	-20%

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

** FY25-26 FTE: The figures align to each department's updated personnel counts



Office of the Director/Administrative Services

Purpose Statement

The purpose of the 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:

The Human Resources Department has updated its Strategic Plan with the goal of enhancing the services we provide to the County. We have made substantial progress on our previous initiatives, including the integration of Employee Policy and Practices (EPP) with the County Code and improvements to our internal complaint processes, both of which are nearing completion. Moving forward, we aim to reevaluate and significantly enhance our Employee Recognition Programs to deliver greater value. Additionally, we are committed to further improving customer service satisfaction within Human Resources by identifying inefficiencies and focusing on areas of improvement.

Employee Policy and Practices (EPP)/County Code Integration

Our engagement with a local human resources consulting firm since December, 2020, has resulted in significant progress in our effort to create new and revise existing employment policies so that they are in compliance with federal and state employment laws. To date, our team of consultants and internal staff subject matter experts have made significant edits to 44 Employment Policy and Practices (EPPs). Once edits are complete, next steps include review by County Counsel, Executive Management Team, (EMT), the Policy Committee, and unions, followed by approval by County Administration or the Board of County Commissioners. Simultaneously, employment policy language will be eliminated from the Personnel Ordinance (County Code Section 2.05). The project result will be current policies that are easily accessible by all users.

Internal Complaint Process

In response to a comprehensive audit of the County's practices related to Internal Complaints by the County's Internal Auditor, we have continued to evaluate our processes and apply the recommendations presented in the audit report. Our efforts during this fiscal year include a thorough review of the business process and development of the Internal Complaints module within the Origami database. Utilizing this database will allow us to retain current and historic records in one location, actively manage cases, and reporting capabilities. We will continue to make progress on the specific actions that will address the recommendations during FY 25/26.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Output	Number of revised Human Resources Policies and Procedures.	3	7	12	3	12
Output	Number of Internal Complaints investigated per fiscal year.	14	10	7	6	7
Customer Service (NEW)	90% of HR Lines of Business managers who report they "strongly agree" or "agree" that Human Resources Administrative Services within the Director's Office helps their line of business achieve their strategic business results.	100%	n/a**	90%	75%	90%
Output (NEW)	% of employee participation for the Years of Service Events	n/a ⁴	n/a ⁴	60%	39%	60%

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

Performance Measures Narrative:

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

¹ Our efforts to provide excellent customer service and strategic partner consultative services continue to be well received from internal County customers. We will continue to incorporate feedback to ensure this strong trend continues and evolves with the needs of the County.

² We are only reporting on fully approved and implemented Human Resources Policies and Practices in the measure above.

³ This data is collected each Fiscal Year in June.

⁴ New Measure, data not collect for previous FY's.

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



160101-Director's Office

BCC Priority Alignment: Accountable Government

Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	43,866	-	13,979	13,980	29,144	15,165	108%	9,862	51%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	629,839	405,774	694,531	694,531	722,312	27,781	4%	145,597	25%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	300	-	-	-	-	-	(100)	-100%
Other Interfund Transfers	-	-	132,539	196,850	133,426	887	1%	67,809	103%
General Fund Support	221,512	177,464	219,196	195,606	201,156	(18,040)	-8%	2,962	1%
Operating Revenue	851,351	583,537	1,046,266	1,086,987	1,056,894	10,628	1%	216,269	26%
Total Revenue	895,217	583,537	1,060,245	1,100,967	1,086,038	25,793	2%	226,131	26%
Personnel Services	694,669	788,431	824,363	880,103	810,421	(13,941)	-2%	22,687	3%
Materials and Services	229,682	171,455	235,882	191,720	275,617	39,735	17%	77,998	39%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	924,351	959,886	1,060,245	1,071,823	1,086,038	25,793	2%	100,685	10%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Total Appropriated	924,351	959,886	1,060,245	1,071,823	1,086,038	25,793	2%	100,685	10%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	924,351	959,886	1,060,245	1,071,823	1,086,038	25,793	2%	100,685	
Revenues Less Expenses	(29,134)	(376,349)	-	29,144	-				

Notes:

Needed continued services from temp to support programs while admin staff were out on leave. Deputy Director's salary will be split differently due to restructure and oversight assignment, only 20% of salary is billed to DO, rest covered by Risk & Benefits.



Administration

Human Resources Information Systems (HRIS)

Purpose Statement

The purpose of the Human Resources Information Systems program is to 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.

Performance Narrative Statement

Major Initiatives:

ApplicationExtender (AX) Migration to Laserfiche- X is a record management system used by HR to store employee personnel records. The software is outdated and no longer supported, which poses a significant risk to the Couecord Management system that meets all security and compliance requirements, is easy to use, and is highly customizable.

PeopleSoft Fluid Workflow Approval: To enhance efficiency within reTo enhance efficiency within recruitment, position approvals, and personnel transactions (PAs), PeopleSoft Fluid Approval will allow users to submit and approve these changes directly through PeopleSoft workflow. Fluid Approval will significantly reduce the time and resources spent on manual tasks, such as form completion, signature collection, and data entry, while reducing errors. This enhancement will benefit HR, Finance, and all department users.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Result (OLD)	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.	77% ¹	68% ¹	n/a ³	n/a ³	n/a ³
Output (OLD)	Number of HR system enhancements.	6	10	n/a ⁴	n/a ⁴	n/a ⁴
Output (OLD)	Number of HR business process improvements.	9	10	n/a ⁴	n/a ⁴	n/a ⁴
Result (NEW)	Support 2 HR initiatives per fiscal year	n/a**	n/a**	2	23	2
Customer Service (NEW)	90% Satisfaction Rate: Percentage of HR managers and PA Processors who rate HRIS services as "satisfactory" or higher in annual surveys.	n/a**	n/a**	90% ¹	100% ¹	90% ¹
Output (NEW)	# Data Transactions provided	20,295	13,918	7,200	11,356	7,200
Output (NEW)	# HR business process improvements and system enhancements implemented	15	18	10	6	10
Output (NEW)	# of queries revised or developed	n/a**	n/a**	5	10	5

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

The HRIS 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.

1 This data is collected once a calendar year.

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

3 This Measure is
4 Data combined with another measure.

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet
If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



160102-HR Information Systems
BCC Priority Alignment: Accountable Government
Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	16,812	-	60,000	60,000	-	(60,000)	-100%	(25,604)	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	658,230	612,213	610,894	610,894	635,330	24,436	4%	8,218	1%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	196,532	176,531	335,612	139,080	71%	276,768	470%
General Fund Support	221,512	274,764	215,435	36,587	658,576	443,141	206%	480,955	271%
Operating Revenue	879,742	886,977	1,022,861	824,012	1,629,518	606,657	59%	765,941	89%
Total Revenue	896,554	886,977	1,082,861	884,012	1,629,518	546,657	50%	740,337	83%
Personnel Services	821,877	859,605	949,485	755,174	1,034,161	84,675	9%	221,942	27%
Materials and Services	120,461	24,897	133,376	128,838	595,357	461,981	346%	503,959	551%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	942,337	884,502	1,082,861	884,012	1,629,518	546,656	50%	725,900	80%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Total Appropriated	942,337	884,502	1,082,861	884,012	1,629,518	546,656	50%	725,900	80%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	942,337	884,502	1,082,861	884,012	1,629,518	546,656	50%	725,900	
Revenues Less Expenses	(45,783)	2,475	-	-	-				

Notes:

Cost savings from vacant positions. In FY 25/26 there are major technology updates happening approved and funded by TS and GF.



Employee and Labor Relations

Employee and Labor Relations

Purpose Statement

The purpose of the Employee and Labor Relations (ELR) program is to provide collective bargaining, labor contract and policy administration services to the Board of County Commissioners (BCC), County Administration, and all county departments.

Performance Narrative Statement

Major Initiatives:

The Employee and Labor Relations (ELR) program continues to reduce liability for the County by resolving workplace issues early, fostering strong partnerships with departments, and providing guidance on policy and contract interpretation, workplace conflict resolution, performance management, and grievance administration.

In 2024 and 2025, ELR successfully completed negotiations with the three AFSCME bargaining units (CCOM, DTD, and WES), and the Clackamas County Employees Association (CCEA), reaching ratified contracts. These contracts included improvements to paid leave, workers' compensation, and temporary out-of-class and reclassification provisions which better assign us with legislation like Oregon Paid Leave and Equal Pay. We are currently in negotiations with the Federation of Parole and Probation Officers (FOPPO) and will initiate successor bargaining with AFSCME CCOM and the Clackamas County Peace Officers Association (CCPOA) in early 2026.

We will continue to prepare and respond to emerging legal and operational challenges, maintain labor stability, and support strategic initiatives like Oregon Paid Leave and Equal Pay compliance through collective bargaining and consultation.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Result	90% of corrective actions involving written reprimands, suspensions, demotions and employee terminations will have been vetted with E&LR before imposition.	90%	96%	90%	90%	90%
Result	90% of managers/supervisors/will have E&LR training biannually.	90%	93%	90%	90%	90%
Output	Number of collective bargaining agreements and/or other labor agreements negotiated to resolution.	5	20	5	6	6
Output	Number of managers and supervisors completing employee/labor relations training courses.	171	82	171	46	46
Output	Number of corrective actions involving written reprimand and above vetted with E&LR before imposing.	20	47	20	25	n/a
Result	By the end of 2025, ELR will have implemented technologies which will streamline communication and organize information and documentation to promote improved response times, improve our ability to adapt to change, decrease inefficiencies, and overall promote a higher quality of service.	n/a**	n/a**	n/a**	n/a ²	100%
Customer Service (NEW)	90% Satisfaction Rate: Percentage of internal customers (managers, HR staff, union representatives) who rate ELR services as "satisfactory" or higher in annual surveys.	n/a ¹	n/a ¹	n/a ¹	n/a*	90%
Output (NEW)	# of Grievances Resolved: Total number of employee grievances successfully resolved each year.	n/a ¹	n/a ¹	n/a ¹	4	n/a*
Output (NEW)	# of Training Sessions Conducted: Number of labor and performance management training sessions provided annually.	n/a ¹	n/a ¹	n/a ¹	4	13
Output (NEW)	# of Process Improvements Implemented: Number of manual processes that have been evaluated and improved over the course of the year.	n/a ¹	n/a ¹	n/a ¹	n/a**	1 or more
Output (NEW)	# of Consultations Held: Number of consultation sessions conducted with internal customers annually and amount of time spent performing consultations.	n/a ¹	n/a ¹	n/a ¹	1,020	Reduce by 5% in 2026
Output (NEW)	# of Hours Spent Consulting: this is the amount of time ELR is spending collectively in consultations	n/a ¹	n/a ¹	n/a ¹	48,360	Decrease by 5% in 2026
Output (NEW)	# of new/improved self-help resources available on the ELR intranet site.	n/a ¹	n/a ¹	n/a ¹	n/a**	Increase

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

Performance Measures Narrative:

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

¹ New Measure, data not collect for previous FY's.

² On Track

Program includes:

Mandated Services ☐ Y

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

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



Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	10,000	40,000	90,372	90,372	-	(90,372)	-100%	(46,791)	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	590,209	566,208	573,315	573,315	603,251	29,936	5%	26,674	5%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	160,435	148,958	84,510	95,814	235,505	150,995	179%	100,436	74%
Operating Revenue	750,644	715,166	657,825	669,129	838,756	180,931	28%	127,110	18%
Total Revenue	760,644	755,166	748,197	759,501	838,756	90,559	12%	80,319	11%
Personnel Services	489,158	535,956	559,531	510,715	648,026	88,495	16%	136,083	27%
Materials and Services	121,909	173,157	188,666	248,786	190,730	2,064	1%	9,446	5%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	611,067	709,113	748,197	759,501	838,756	90,559	12%	145,529	21%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Total Appropriated	611,067	709,113	748,197	759,501	838,756	90,559	12%	145,529	21%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	611,067	709,113	748,197	759,501	838,756	90,559	12%	145,529	
Revenues Less Expenses	149,577	46,053	-	-	-				

Notes:

This program went through a restructure which resulted in a FT Manager Sr. to supervise over this program. Used to be provided by Deputy Director. Negotiated 6 contracts in FY 25/26 and FAPPO and POA to start in early 2025. Had to use a contractor for negotiations. EPA audit found the need to increase 5% for professional staff to be in compliance for FY 25/26.



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 work in partnership with County Departments to provide strategies and solutions to achieve their operational and strategic results so they can structure their organizations in a way that attracts, retains and equitably compensates employees.

Performance Narrative Statement

Major Initiatives:

The Classification & Compensation unit has undertaken two major initiatives in addition to the review and allocation of all Clackamas County positions, strategic organizational design, and maintenance of the County's classification and compensation plans.

Ensuring Oregon Equal Pay Act Compliance

In response to the Oregon Equal Pay Act, Classification & Compensation has implemented significant measures to promote equitable compensation. A core element of this effort is the mandatory salary placement assessment for all regular, limited-term, temporary, and seasonal appointments. This process ensures equity, consistency, and legal compliance in all placement decisions.

Classification & Compensation is also responsible for conducting a triennial equal pay audit in accordance with the law. This was last completed January 1, 2025 with the next triennial audit planned for initiation in the fall of 2027.

Classification & Compensation is in the process of revising pay practices and policies to eliminate the potential for pay equity issues moving forward. This process includes revision of collective bargaining agreement language related to compensation practices.

Structured Classification Reviews

Classification & Compensation continues to make progress on ensuring our classification specifications are up to date, that we are paying competitive wages and that employees are classified appropriately go hand-in-hand with the County's Equal Pay Analysis.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Result (NEW)	By July 2026, new classification and pay administration policies will be established.	n/a ¹	n/a ¹	100%	50%	100%
Customer Service (New)	90% of Departments agree that the County's classifications align with business needs.	n/a ¹	n/a ¹	n/a ¹	n/a ¹	90%
Customer Service (New)	80% of Departments agree that the County's pay plans align with business needs.	n/a ¹	n/a ¹	n/a ¹	n/a ¹	80%
Output	# Market studies conducted (individual classifications and job families)	61	79	100	40	100
Output (New)	# New classifications	n/a ¹	10	n/a	7	n/a
Output (New)	# Revised classifications	n/a ¹	37	n/a	27	n/a
Output (New)	# Archived Classifications	n/a ¹	20	n/a	5	n/a
Output (New)	# Salary placements	n/a ¹	1060	n/a	785	n/a
Output (New)	# Vacant/new position reviews	n/a ¹	269	n/a	227	n/a
Output (New)	# Incumbent position review	n/a ¹	71	n/a	61	n/a

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

Performance Measures Narrative:

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

¹ New Measure, data not collected for previous FY's.

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

Explanation



160302-Classification & Compensation
 BCC Priority Alignment: Accountable Government

Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	-	60,000	-	-	-	-	-	(20,000)	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	857,801	735,652	727,500	727,500	756,600	29,100	4%	(17,051)	-2%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	140,904	140,904	152,216	11,312	8%	105,248	224%
General Fund Support	177,316	155,539	363,289	173,339	277,212	(86,077)	-24%	108,481	64%
Operating Revenue	1,035,117	891,191	1,231,693	1,041,743	1,186,028	(45,665)	-4%	196,678	20%
Total Revenue	1,035,117	951,191	1,231,693	1,041,743	1,186,028	(45,665)	-4%	176,678	18%
Personnel Services	790,464	725,377	1,099,547	862,616	1,068,366	(31,182)	-3%	275,547	35%
Materials and Services	73,620	33,104	132,146	179,127	117,662	(14,484)	-11%	22,378	23%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	864,085	758,481	1,231,693	1,041,743	1,186,028	(45,666)	-4%	297,925	34%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Total Appropriated	864,085	758,481	1,231,693	1,041,743	1,186,028	(45,666)	-4%	297,925	34%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	864,085	758,481	1,231,693	1,041,743	1,186,028	(45,666)	-4%	297,925	
Revenues Less Expenses	171,032	192,710	-	-	-				

Notes:

Former HR Manager, Sr. Heather Pedersen was promoted to Dep. Director. Nina Smith is filling in as a limited term HR Manager (which is a lower classification).



Workforce Design

Recruitment and Selection

Purpose Statement

The purpose of the Recruitment and Selection program is to provide consultation, outreach, evaluation, and selection services to County Departments so they can hire and retain the qualified, diverse workforce they need to achieve their strategic results.

Performance Narrative Statement

Major Initiatives:

The Recruitment and Selection Division has two major initiatives in addition to providing support to departments to attract a qualified and diverse workforce.

Recruitment Backlog

In response to the recruitment backlog in FY 24-25, the decision was made to extend two crucial limited-duration positions for a third year. These roles are essential for maintaining the high level of service our organization strives for, ensuring that we can effectively meet our staffing needs and prevent any further backlogs in the hiring process.

Improvements

Recruitment and Selection continues to look for ways to improve the recruitment process for applicants, hiring managers, and recruiters. The Recruitment Team began utilizing LinkedIn and Indeed to broaden our candidate sourcing capabilities, tapping into a wider talent pool. A quarterly training focused on recognizing and minimizing bias in the recruitment process was implemented. This initiative aims to foster a more equitable hiring environment and ensure diverse candidate representation. Also, a major PeopleSoft upgrade was completed. This upgrade was necessary for continued software support and also provided enhancements to improve the applicant experience. Through this system upgrade departments with temporary positions will also benefit from using PeopleSoft in the recruitment process.

Partnership

Recruitment and Selection continues to partner with departments, and other divisions within HR to support the County's recruitment needs. Recruitment and Selection will focus on developing additional resources and learning opportunities focused around recruitment in partnership with others to help strengthen the recruitment process at Clackamas County. Recruitment and Selection continues to represent the County at career and events and looks forward to partnering with local community events to showcase all the wonderful opportunities the County has to offer.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Result	70% of open positions are filled within 90 days from the date of requisition ¹	70%	85%	70%	79%	70%
Output	Number of hires per year (including temps and seasonal)	320	477	320	350	350
Output	Number of job postings (recruitments) per year	260	355	260	274	290
Result NEW	By the end of 2025, review, revise and implement updated recruitment policies that will help to reduce internal barriers within the county's recruitment process.	n/a ¹	n/a ¹	n/a ¹	n/a ¹	100%
Customer Service (NEW)	90% of participants "agree" or "strongly agree" that they are satisfied with the services provided by the Recruitment and Selection Program. (Result from HR annual survey)	n/a ¹	n/a ¹	n/a ¹	n/a ¹	90%
Output (NEW)	# of hires who identify as a Person of Color	n/a ¹	117	N/A	84	90
Output (NEW)	# of recruitment request received per year	n/a ¹	397	N/A	339	290
Output (OLD)	Number of recruitment outreach events per year ²	24	**	N/A	N/A	N/A

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

Performance Measures Narrative:

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

New

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

¹ New Measure, data not collected for previous FY's.

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

Explanation



160303-Recruitment & Selection
 BCC Priority Alignment: Accountable Government
 Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	5,000	-	-	-	-	-	-	(1,667)	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	917,449	1,068,731	1,057,978	1,057,978	1,100,297	42,319	4%	85,578	8%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	214,768	176,474	137,561	177,532	54,529	(83,032)	-60%	(135,063)	-71%
Other Interfund Transfers	-	-	226,615	-	-	(226,615)	-100%	-	-
General Fund Support	300,435	337,086	285,271	336,320	654,494	369,223	129%	329,880	102%
Operating Revenue	1,432,652	1,582,291	1,707,425	1,571,830	1,809,320	101,895	6%	280,396	18%
Total Revenue	1,437,652	1,582,291	1,707,425	1,571,830	1,809,320	101,895	6%	278,729	18%
Personnel Services	1,236,741	1,524,361	1,605,187	1,501,803	1,731,215	126,028	8%	310,246	22%
Materials and Services	112,581	81,867	102,238	70,027	78,105	(24,133)	-24%	(10,053)	-11%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	1,349,322	1,606,228	1,707,425	1,571,830	1,809,320	101,895	6%	300,193	20%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Total Appropriated	1,349,322	1,606,228	1,707,425	1,571,830	1,809,320	101,895	6%	300,193	20%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	1,349,322	1,606,228	1,707,425	1,571,830	1,809,320	101,895	6%	300,193	
Revenues Less Expenses	88,330	(23,937)	-	-	-				

Notes:

Jared Haddock HR Manager, Sr. left on 12/31/2024. New manager not being hired until March 2025.



Workforce Design

Employee Engagement and Development

Purpose Statement

The purpose of the Employee Engagement and Development Program is to empower supervisors and enhance organizational capabilities by delivering comprehensive learning and development services. This program is designed to equip County departments with the tools and resources necessary to proactively address both current and future development needs leading to increased engagement.

Performance Narrative Statement

The Employee Engagement and Development (EE&D) program supports countywide learning and development, change initiatives, leadership development, and provides custom team building and work environment enhancement services. The team, comprised of 3 FTE, focuses internal resources on custom efforts, and utilizes vendor support to deliver services where time and resources are limited and outside expertise is beneficial. Much of the EE&D budget dollars go towards learning events and training content.

Challenges: Without addressing these challenges, we risk reduced organizational performance and employee satisfaction, as well as missed opportunities for talent development.

- Roles and responsibilities of supervisors are getting more complex. Some contributing factors are additional labor laws and evolving workplace expectations of employees.
- Employees, especially managers and supervisors, struggle to devote time to development. This leads to empty seats and cancelled sessions.

Opportunities: With these strategic initiatives, EE&D is poised to address current workforce challenges and create a vibrant culture of continuous learning across the county.

- Employee engagement survey (annual with vendor partner Gallup) and learning needs assessment results leading to re-aligned core services and training curriculum to better meet the needs of the organization and our workforce. Taking a more data-driven approach to resource allocations decisions that will result in employees building skills and accessing resources where most needed.
- Focus to improve marketing – intentionally scheduling and announcing opportunities well in advance to alleviate barriers for employees to participate in development.
- Support and collaborate with a steering committee whose members are managers from across the county. A key priority for this group is to make recommendations to improve the work environment for managers and supervisors – to be more supportive of and positively incentivize ongoing leadership development.

Key Performance Measures

		FY 22-23 Actual	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Result (OLD)	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 Employee Engagement and Development program.	25%	n/a**	50%	n/a ²	n/a ²
Result (OLD)	90% of Learning & Development participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time.	94% ¹	92%	90%	n/a ²	n/a ²
Result (OLD)	90% of employees will have a documented summary of performance at least annually.	70%	72%	90%	n/a ²	n/a ²
Output (OLD)	Number of Workforce planning consultations.	35	n/a**	50	n/a ²	n/a ²
Output (OLD)	Number of County employees engaged in learning events.	1215	1893	2000	n/a ²	n/a ²
Output (OLD)	Number of employees with a documented summary of performance each year.	1120	1661	1800	n/a ²	n/a ²
Result (NEW)	By 2028 100% of regular employees will participate in voluntary learning and development opportunities each fiscal year	n/a**	19%	20%	11%	35%
Customer Service (NEW)	90% of Learning and Development Participants "agree" or "strongly agree" that Learning & Development events were a valuable investment of their time	n/a**	92%	90%	95%	90%
Output (NEW)	# Learning and development events	n/a**	39	40	27	40

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

Performance Measures Narrative:

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

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

Average percentage of quarterly data

Discontinued

¹

²

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

Explanation



160304-Employee Engagement & Dev
BCC Priority Alignment: Accountable Government
Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	27,966	-	-	-	-	-	-	(9,322)	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	401,142	665,527	371,859	371,859	386,733	14,874	4%	(92,776)	-19%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	211,495	195,286	192,299	13,797	271,633	79,334	41%	131,440	94%
Operating Revenue	612,637	860,813	564,158	385,656	658,366	94,208	17%	38,664	6%
Total Revenue	640,603	860,813	564,158	385,656	658,366	94,208	17%	29,342	5%
Personnel Services	428,747	396,581	429,919	256,615	458,518	28,600	7%	97,870	27%
Materials and Services	192,450	140,832	134,240	129,041	199,848	65,608	49%	45,740	30%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	621,197	537,413	564,159	385,656	658,366	94,208	17%	143,611	28%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-	-	-
Total Appropriated	621,197	537,413	564,159	385,656	658,366	94,208	17%	143,611	28%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	621,197	537,413	564,159	385,656	658,366	94,208	17%	143,611	
Revenues Less Expenses	19,406	323,400	-	-	-				

Notes:

Reclassified vacant Senior Manager position to an Analyst and added specialist. Analyst position is paid partially by Benefits. Overall salary savings.



Benefits and Wellness

Benefits Administration

Purpose Statement

The purpose of the Benefits Administration and Wellness Services program is to provide health and retirement plan services to County departments and employees so they can achieve their results through a productive workforce.

Performance Narrative Statement

Major Initiatives:

In addition to continuing to offer a very competitive employee benefits package in support of our mission, the Benefits and Wellness division has laid the groundwork to transition to modern approaches to employee benefit processing, internal controls, and improved benefits technology solutions.

In 2022 we completed Phase 3 of our Benefits Service Delivery Transformation in order to prepare to implement our service delivery strategy. After careful consideration of Clackamas County's needs, it was determined to not outsource the administration of benefits, but instead look at leveraging our current system to strategically manage benefits administration. The Benefits team is creating a strategy to achieve success in the following areas:

- Enhanced customer experience
- Implement plan sponsor best practices
- Introduce comprehensive compliance, audit, and controls
- Minimize manual processing and reconciliation
- Access to accurate and timely data with dashboard reporting
- Instill consistent vendor management practices
- Transform benefits team service delivery model

We also began evaluating and preparing for Oregon Paid Family Medical Leave (PFML), a recent state-mandated leave that applies to the county and its workforce. The new law provides a broad benefit to workers across the state, but also significantly increases complexity and risk to program administration.

The County considered three options to ensure compliance with this new law: adopt the state program, self-administer and fund an equivalent plan, or offer a fully insured equivalent plan and outsource its administration. Ultimately, the County determined to move forward with utilizing a fully insured equivalent plan and outsource its administration based on a number of factors, including the current state of its Leave Administration program, which lacks modern approaches to program administration in its processes and technology. These lead to diminished customer experience, errors in reporting and compliance, and unnecessary risk exposure for the County.

By leveraging our current employee disability benefits carrier and third-party administrator The Standard for all leave and disability administration, the County is able to ensure compliance with Oregon PFML requirements, as well as improve customer experience, provide effective coordination of benefits, gain access to accurate and timely data and reporting, and introduce comprehensive compliance, audits and controls for all leave and disability benefit administration. This will also allow for a transformation of the in-house leave administration team with renewed

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Customer Service	80% of Departments "agree" or "strongly agree" that employee benefit plans are effective in maintaining a productive workforce.	n/a **	n/a ²	80%	na*	80%
Output (NEW)	# of people participating in the Wellness Fair	n/a ¹	325	350	350	350
Output (NEW)	# of people participating in Benefits Webinars	n/a ³	n/a ³	260	356	260

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

Performance Measures Narrative:

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

¹ This data was not available due to staff changes.

² This data was not collected by the annual survey from County Administration in Dec 2023.

³ New Measure, data not collected for previous FY's.

Program includes:

Mandated Services ☐ Y

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

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



160401-Benefits Administration
 BCC Priority Alignment: Accountable Government
 Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	2,555,561	2,631,954	1,800,987	2,949,628	1,279,206	(521,781)	-29%	(1,433,175)	-53%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	1,923,516	2,020,335	2,063,985	2,083,652	2,071,826	7,841	0%	62,658	3%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	483,052	1,008,400	491,471	490,546	877,160	385,689	78%	216,494	33%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	2,406,568	3,028,735	2,555,456	2,574,198	2,948,986	393,530	15%	279,153	10%
Total Revenue	4,962,129	5,660,688	4,356,443	5,523,826	4,228,192	(128,251)	-3%	(1,154,022)	-21%
Personnel Services	1,809,456	2,053,836	2,499,580	2,498,932	2,656,112	156,532	6%	535,371	25%
Materials and Services	520,719	572,123	1,682,368	1,745,688	1,539,868	(142,500)	-8%	593,691	63%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	2,330,175	2,625,959	4,181,948	4,244,620	4,195,980	14,032	0%	1,129,062	37%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	174,495	-	32,212	(142,283)	-82%	32,212	-
Total Appropriated	2,330,175	2,625,959	4,356,443	4,244,620	4,228,192	(128,251)	-3%	1,161,274	38%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	2,330,175	2,625,959	4,356,443	4,244,620	4,228,192	(270,534)	-6%	1,161,274	
Revenues Less Expenses	2,631,954	3,034,729	-	1,279,206	-				

Notes:

None



Administration

Leave Administration

Purpose Statement

The purpose of the Leave Administration program is to deliver comprehensive leave management and disability support to County departments and employees. Our goal is to foster a healthy work-life balance, enabling employees to effectively navigate their leave options while ensuring organizational continuity and a resilient workforce.

Performance Narrative Statement

Major Initiatives: Leave Administration has three major initiatives that will deliver an employee absence and disability management program that supports workforce and business requirements leading to improvements in retention, morale, absenteeism and productivity.

Business Process Improvements: Develop and provide templates, process flows and guides to educate and streamline the protected leave of absence and accommodation process for supervisors and employees. These resources will offer clear, step-by-step instructions to help both supervisors and employees navigate protected leave and accommodation processes with confidence and consistency. Standardized templates and visual process flows will reduce errors, improve response times, and ensure compliance with legal and organizational requirements. By simplifying complex procedures, these tools will promote transparency, enhance communication, and support a more efficient and user-friendly experience.

Supervisor Training: Provide quarterly training to supervisors on building a knowledge base on protected leave of absence and accommodation processes. These sessions will cover legal requirements, internal procedures, and best practices for effectively managing employees who have protected leave and/or accommodations. Training will include information to enhance supervisors' ability to recognize and respond to employee leave requests. Continuous education will ensure supervisors remain current with County policies, and federal and state law while fostering a supportive and compliant work environment.

Customer Service: Provide timely customer service to employees and supervisors and ensuring they have the resources and information necessary to support employee leave of absences and business operations. This includes responding promptly to inquiries, offering personalized guidance, and proactively addressing potential issues before they escalate. Ongoing communication and support will help build trust, and ensure a smooth leave and accommodation experience for both employees and supervisors.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Output	# of paid leave requests.	249	1091 ³	450	620	450
Result (NEW)	By the end of 2025, Leave Administration will develop resources for the Leave Administration team such as templates, process flows and guides.	n/a ¹	n/a ¹	New	13	14
Result (NEW)	By the end of 2025, Leave Administration or its agent will develop customer resources for training employees and managers consistent with internal resources.	n/a ¹	n/a ¹	New	14	20
Result (NEW)	By the end of 2025 Leave Administration or its agent will conduct three (3) employee and manager trainings on leave issues.	n/a ¹	n/a ¹	100%	2% ²	100%
Customer Service (NEW)	90% of supervisors and managers acknowledge that they "agree" or "strongly agree" that they have timely and accurate information about their employees' protected leaves and disability.	n/a ¹	n/a ¹	90%	n/a*	90%
Customer Service (NEW)	80% of Departments "agree" or "strongly agree" that employee leave and disability services are effective in maintaining a productive workforce.	n/a ¹	n/a ¹	80%	n/a*	80%
Customer Service (NEW)	80% of supervisors and managers acknowledge that they "agree" or "strongly agree" with having adequate resources to support protected employee leave.	n/a ¹	n/a ¹	80%	n/a*	80%
Output (NEW)	# of accommodation requests received	n/a ¹	76	100	118	100

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

Performance Measures Narrative:

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

¹ New Measure, data not collected for previous FY's.

Trainings scheduled for April & May of 2025

This data is from 9/2023-9/2024

2

3

Program includes:

Mandated Services ☐ Yes

Shared Services ☐ No

Grant Funding ☐ No

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

Federal and state law require compliance with leave of absence and accommodation laws which is achieved through Leave Administration in conjunction with its Third-Party Vendor



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CLACKAMAS
COUNTY



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:

- Medical insurance for active employees, retirees, and COBRA participants.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Customer Service (NEW)	80% of Departments "agree" or "strongly agree" that employee medical plans are effective in attracting and maintaining a productive workforce.	n/a ¹	n/a ¹	80%	n/a*	80%
Output (NEW)	# of subscribers	2,065	2,135	n/a	2224	n/a
Output (NEW)	# of total covered lives	na**	na**	n/a	na**	n/a

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

Performance Measures Narrative:
are in the process of realigning our performance measures to accurately reflect the work we are doing.

***Note-HR program areas

¹ New Measure, data not collected for previous FY's.

Program includes:

Mandated Services ☐ Y

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

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



160402-Medical Insurance

BCC Priority Alignment: Accountable Government

Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	18,216,944	19,304,760	23,067,357	19,858,436	18,297,682	(4,769,675)	-21%	(829,031)	-4%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	352	21,601	-	-	-	-	-	(7,318)	-100%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	28,510,724	30,516,078	30,615,148	33,335,000	33,335,000	2,719,852	9%	2,547,733	8%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	28,511,076	30,537,679	30,615,148	33,335,000	33,335,000	2,719,852	9%	2,540,415	8%
Total Revenue	46,728,019	49,842,439	53,682,505	53,193,436	51,632,682	(2,049,823)	-4%	1,711,384	3%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	27,423,259	30,069,102	31,746,077	32,199,164	35,612,636	3,866,559	12%	5,715,461	19%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	27,423,259	30,069,102	31,746,077	32,199,164	35,612,636	3,866,559	12%	5,715,461	19%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	2,696,590	2,696,590	621,254	(2,075,336)	-77%	(277,609)	-31%
Contingency	-	-	16,274,838	-	12,433,792	(3,841,046)	-24%	12,433,792	-
Total Appropriated	27,423,259	30,069,102	50,717,505	34,895,754	48,667,682	(2,049,823)	-4%	17,871,643	58%
Reserve for Future Expenditures	-	-	2,965,000	-	2,965,000	-	0%	2,965,000	-
Total Expense	27,423,259	30,069,102	53,682,505	34,895,754	51,632,682	(7,966,205)	-15%	20,836,643	
Revenues Less Expenses	19,304,760	19,773,336	-	18,297,682	-				

Notes:

None



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:

- Dental insurance for active employees, retirees, and COBRA participants.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Customer Service (NEW)	80% of Departments "agree" or "strongly agree" that employee dental plans are effective in attracting and maintaining a productive workforce.	n/a ¹	n/a ¹	80%	n/a*	80%
Output (NEW)	# of subscribers	2,093	2,173	n/a	2223	n/a
Output (NEW)	# of total covered lives	na**	na**	n/a	na**	n/a

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

Performance Measures Narrative:
are in the process of realigning our performance measures to accurately reflect the work we are do.

***Note-HR program areas

¹ New Measure, data not collected for previous FY's.

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



160403-Dental Insurance

BCC Priority Alignment: Accountable Government

Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	1,972,926	2,139,889	2,735,162	2,305,750	2,333,575	(401,587)	-15%	194,053	9%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	-	1,168	-	-	-	-	-	(389)	-100%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	2,364,497	2,392,469	2,479,030	2,387,407	2,375,347	(103,683)	-4%	(6,111)	0%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	2,364,497	2,393,637	2,479,030	2,387,407	2,375,347	(103,683)	-4%	(6,500)	0%
Total Revenue	4,337,424	4,533,527	5,214,192	4,693,157	4,708,922	(505,270)	-10%	187,553	4%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	2,197,534	2,227,776	1,866,325	2,359,582	2,414,560	548,235	29%	152,929	7%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	2,197,534	2,227,776	1,866,325	2,359,582	2,414,560	548,235	29%	152,929	7%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	3,000,867	-	1,947,362	(1,053,505)	-35%	1,947,362	-
Total Appropriated	2,197,534	2,227,776	4,867,192	2,359,582	4,361,922	(505,270)	-10%	2,100,291	93%
Reserve for Future Expenditures	-	-	347,000	-	347,000	-	0%	347,000	-
Total Expense	2,197,534	2,227,776	5,214,192	2,359,582	4,708,922	(1,558,775)	-30%	2,447,291	
Revenues Less Expenses	2,139,889	2,305,750	-	2,333,575	-				

Notes:

None



Benefits and Wellness

Disability Insurance

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Customer Service (NEW)	80% of Departments "agree" or "strongly agree" that employee disability plans and services are effective in attracting and maintaining a productive workforce.	n/a ¹	n/a ¹	80%	n/a*	80%

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

Performance Measures Narrative:

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

1 This data was not available due to staff changes.

2 This data was not collected by the annual survey from County Administration in Dec 2023.

3 Return to Work data isn't available until July so this data is an estimate.

4 New Measure, data not collected for previous years.

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



160404-Disability Insurance

BCC Priority Alignment: Accountable Government

Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	1,102,805	1,576,058	1,639,833	1,758,630	1,682,335	42,502	3%	203,171	14%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	-	-	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	731,170	334,840	347,291	267,705	350,000	2,709	1%	(94,572)	-21%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	731,170	334,840	347,291	267,705	350,000	2,709	1%	(94,572)	-21%
Total Revenue	1,833,975	1,910,898	1,987,124	2,026,335	2,032,335	45,211	2%	108,599	6%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	257,918	152,268	480,326	344,000	418,000	(62,326)	-13%	166,605	66%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	257,918	152,268	480,326	344,000	418,000	(62,326)	-13%	166,605	66%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	1,466,647	-	1,574,184	107,537	7%	1,574,184	-
Total Appropriated	257,918	152,268	1,946,973	344,000	1,992,184	45,211	2%	1,740,789	692%
Reserve for Future Expenditures	-	-	40,151	-	40,151	-	0%	40,151	-
Total Expense	257,918	152,268	1,987,124	344,000	2,032,335	152,748	8%	1,780,940	
Revenues Less Expenses	1,576,058	1,758,630	-	1,682,335	-				

Notes:

None



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:

- EAP services for active employees, retirees, and COBRA participants.
- EAP services for Managers and Supervisors.
- Wellness events and opportunities.

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Customer Service (NEW)	To achieve and maintain an 80% satisfaction rate among Departments, with them "agreeing" or "strongly agreeing" that the Employee Assistance Program (EAP) and wellness benefits effectively contribute to enhancing employee satisfaction, departmental productivity, and play a significant role in attracting and retaining a productive workforce.	n/a ¹	n/a ¹	80%	na*	80%
Output (NEW)	# of web users and self referrals to the Countys EAP vendor outreach	1,070	1,131	1,000	657	1,000
Output (NEW)	# of service utilization	532	351	450	574	450
Output (NEW)	# of activities	284	249	200	181	200

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

Performance Measures Narrative:

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

¹ New Measure, data not collected for previous FY's

***Note-

2

This Measure is discontinued

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



160405-EAP/Wellness

BCC Priority Alignment: Accountable Government

Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	746,852	792,845	606,013	830,253	543,940	(62,073)	-10%	(246,044)	-31%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	83,619	86,499	80,611	80,611	-	(80,611)	-100%	(83,576)	-100%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	94,097	109,270	100,502	112,366	112,000	11,498	11%	6,756	6%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	177,716	195,769	181,113	192,977	112,000	(69,113)	-38%	(76,821)	-41%
Total Revenue	924,568	988,615	787,126	1,023,230	655,940	(131,186)	-17%	(322,864)	-33%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	131,722	158,362	476,119	479,290	321,224	(154,895)	-33%	64,766	25%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	131,722	158,362	476,119	479,290	321,224	(154,895)	-33%	64,766	25%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	311,007	-	334,716	23,709	8%	334,716	-
Total Appropriated	131,722	158,362	787,126	479,290	655,940	(131,186)	-17%	399,482	156%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	131,722	158,362	787,126	479,290	655,940	(107,477)	-14%	399,482	
Revenues Less Expenses	792,845	830,253	-	543,940	-				

Notes:

None



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 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Customer Service (NEW)	80% of Departments "agree" or "strongly agree" that employee retirement plans are effective in attracting and maintaining a productive workforce.	n/a ¹	n/a ¹	80%	n/a*	80%
Output (NEW)	# of participants	1,867	1,730	n/a	1,785	n/a
Output (NEW)	\$ of participant deferrals	\$ 10,847,863.47	\$ 11,762,425.40	n/a	\$ 13,596,285.13	n/a
Output (NEW)	\$ of employer contributions	\$ 2,411,797.79	\$ 2,638,768.76	n/a	\$ 2,924,785.89	n/a

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

Performance Measures Narrative:

program areas are in the process of realigning our performance measures to accurately reflect the work we are doing. collected in previous FY's.

***Note-HR

1 New Measure, data not

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



160406-Deferred Compensation
 BCC Priority Alignment: Accountable Government
 Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	2,082	1,682	3,971	(2,167)	-	(3,971)	-100%	(532)	-100%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	-	-	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	3,000	2,167	5,950	2,950	98%	5,228	724%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	-	-	3,000	2,167	5,950	2,950	98%	5,228	724%
Total Revenue	2,082	1,682	6,971	-	5,950	(1,021)	-15%	4,695	374%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	400	3,849	6,150	-	5,950	(200)	-3%	4,534	320%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	400	3,849	6,150	-	5,950	(200)	-3%	4,534	320%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	821	-	-	(821)	-100%	-	-
Total Appropriated	400	3,849	6,971	-	5,950	(1,021)	-15%	4,534	320%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	400	3,849	6,971	-	5,950	(1,842)	-26%	4,534	
Revenues Less Expenses	1,682	(2,167)	-	-	-				

Notes:
None



Risk & Safety Management

Risk Administration

Purpose Statement

The purpose of the Risk Administration program is to provide risk and safety management services to County departments and employees so they can create a workplace culture committed to practices that reduce risk, sustain a healthy workforce and preserve financial resources.

Performance Narrative Statement

Major Initiatives/Goals:

Continue optimization of the RMIS system for liability and workers compensation claims handling: Efficiency improvements continue to emerge, thereby reducing administrative burden and allowing more time toward analysis and management of County risks and claims. Additionally, other areas of HR continue to explore the use of the system for their own process optimization.

Goals: Continue to look for best insurance or risk transfer options; Keep County Risk allocation increases to a minimum; Protect County employees and assets

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Customer Service (NEW)	90% of Departments agree that general risk and safety management services met their expectations for reducing risk, sustain a healthy workforce and preserve financial resources.	n/a ¹	n/a	90%	n/a*	90%
Output	# Ergonomic Assessments	40	46	n/a	21	n/a
Output	# Driving Checks	278	471	n/a	338	n/a
Output (NEW)	# Real Time Risk Management Data Reporting	n/a ¹	100%	100%	100%	100%
Output (NEW)	# Department Safety and Loss Control Consulting	n/a ¹	n/a ¹	n/a	n/a	n/a

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

Performance Measures Narrative:

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

¹ New Measure, data not collect for previous FY's.

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



	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	81,138	54,468	-	47,737	50,809	50,809	-	(10,306)	-17%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	1,610,327	1,719,024	2,089,247	2,089,247	2,117,194	27,947	1%	310,995	17%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	9,542	-	-	-	-	-	(3,181)	-100%
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	1,610,327	1,728,566	2,089,247	2,089,247	2,117,194	27,947	1%	307,815	17%
Total Revenue	1,691,465	1,783,034	2,089,247	2,136,984	2,168,003	78,756	4%	297,509	16%
Personnel Services	1,403,452	1,497,776	1,817,446	1,817,446	1,840,904	23,458	1%	268,013	17%
Materials and Services	233,545	237,521	268,732	268,729	274,164	5,431	2%	27,566	11%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	1,636,997	1,735,297	2,086,179	2,086,175	2,115,068	28,890	1%	295,579	16%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	3,068	-	52,935	49,867	1625%	52,935	-
Total Appropriated	1,636,997	1,735,297	2,089,247	2,086,175	2,168,003	78,757	4%	348,514	19%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	1,636,997	1,735,297	2,089,247	2,086,175	2,168,003	128,624	6%	348,514	
Revenues Less Expenses	54,468	47,737	-	50,809	-				

Notes:

Administration program line. Salaries and program overhead continue to rise, some in-step with economic inflation, some in excess.



Risk & Safety Management

Casualty/Liability

Purpose Statement

The purpose of the Casualty/Liability program is to provide funding, insurance coverage, claims management and risk consultation to County departments in an effort to effectively manage costs and resolve matters of liability against the County.

Performance Narrative Statement

SERVICES:

- Casualty/Liability self-insured and liability claims funding
- Casualty/Liability claims management
- Liability (excess), cyber, public officials, volunteer and property insurance policies
- Contract risk reviews; Driver program management

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Output	# of liability claims.	86	99	100	114	100
Results	Maintain Clackamas County's ratio of actual liability claims losses paid to the actuarial estimate at 1 or below. ¹	0.8	Discontinued	Discontinued	Discontinued	Discontinued
Result (NEW)	Clackamas County's yearly paid liability claims losses are transparent and within budget	n/a ²	\$ 1,232,735	\$ 1,300,000	\$ 715,081	\$ 1,350,000
Customer Service (NEW)	90% of Departments agree that the liability and claims management program is efficient and effective in resolving County liability matters.	n/a ²	n/a ²	90%	n/a*	90%
Output (NEW)	# Annual Casualty/Liability Allocation	n/a ²	\$ 3,250,000	\$ 3,250,000	\$ 3,250,000	\$ 3,380,000

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

Performance Measures Narrative:

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

¹ This data is per Fiscal Year and collected annually in June.

Measure, data not collect for previous FY's.

² New

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

Explanation



160502-Casualty/Liability

BCC Priority Alignment: Accountable Government

Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	9,772,288	9,268,934	8,609,641	9,151,631	9,719,479	1,109,838	13%	321,861	3%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	1,680,092	2,060,967	2,096,310	2,096,310	1,875,806	(220,504)	-11%	(69,984)	-4%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	200,183	411,144	100,000	250,000	200,000	100,000	100%	(87,109)	-30%
Other Interfund Transfers	-	-	1,000,000	1,000,000	-	(1,000,000)	-100%	(333,333)	-100%
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	1,880,275	2,472,111	3,196,310	3,346,310	2,075,806	(1,120,504)	-35%	(490,426)	-19%
Total Revenue	11,652,563	11,741,045	11,805,951	12,497,941	11,795,285	(10,666)	0%	(168,565)	-1%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	2,383,630	2,589,413	2,833,500	2,778,462	2,802,500	(31,000)	-1%	218,665	8%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	2,383,630	2,589,413	2,833,500	2,778,462	2,802,500	(31,000)	-1%	218,665	8%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	6,302,451	-	6,302,785	334	0%	6,302,785	-
Total Appropriated	2,383,630	2,589,413	9,135,951	2,778,462	9,105,285	(30,666)	0%	6,521,450	252%
Reserve for Future Expenditures	-	-	2,670,000	-	2,690,000	20,000	1%	2,690,000	-
Total Expense	2,383,630	2,589,413	11,805,951	2,778,462	11,795,285	(10,332)	0%	9,211,450	
Revenues Less Expenses	9,268,934	9,151,631	-	9,719,479	-				

Notes:

Rising social and economic inflationary factors continue to increase costs of casualty and liability claims.



Risk & Safety Management

Workers' Compensation

Purpose Statement

The purpose of the Workers' Compensation program is to provide funding, workers' compensation coverage, claims management and risk consultation to County departments, in an effort to effectively manage costs and resolve matters involving employees injured while in the course and scope of employment at the County.

Performance Narrative Statement

SERVICES:

- Workers' 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 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Result	Clackamas County will maintain a workers' compensation rating below the state's industry average. ¹	77%	89%	100%	89%	100%
Output	Number of workers' compensation claims processed quarterly	73	discontinue	discontinue	discontinue	discontinue
Customer Service (NEW)	90% of Departments agree that the Workers' Compensation program efficiently and effectively resolves matters involving workforce injury claims.	n/a ²	n/a ²	90%	n/a*	90%
Output	# Workers' Compensation Claims	n/a ²	99	120	67	120
Output	# Annual Workers' Compensation Allocation	n/a ²	\$ 2,400,000	n/a	\$ 2,400,000	\$ 2,495,000

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

Performance Measures Narrative:

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

¹ This data is per Fiscal Year and collected annually in June Measure, data not collect for previous FY's.

² New

Program includes:

Mandated Services ☐ N

Shared Services ☐ N

Grant Funding ☐ N

Explain all "Yes" boxes below

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

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

Explanation



160503-Workers' Compensation
 BCC Priority Alignment: Accountable Government
 Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	2,115,836	1,795,549	1,893,924	1,914,081	2,377,524	483,600	26%	435,702	22%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	1,637,614	1,896,584	1,464,443	1,464,443	1,882,000	417,557	29%	215,786	13%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	1,000,000	1,000,000	-	(1,000,000)	-100%	(333,333)	-100%
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	1,637,614	1,896,584	2,464,443	2,464,443	1,882,000	(582,443)	-24%	(117,547)	-6%
Total Revenue	3,753,450	3,692,133	4,358,367	4,378,524	4,259,524	(98,843)	-2%	318,155	8%
Personnel Services	(20,760)	-	-	-	-	-	-	6,920	-100%
Materials and Services	1,978,661	1,778,052	1,956,000	2,001,000	2,085,000	129,000	7%	165,763	9%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	1,957,901	1,778,052	1,956,000	2,001,000	2,085,000	129,000	7%	172,682	9%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	1,402,367	-	1,174,524	(227,843)	-16%	1,174,524	-
Total Appropriated	1,957,901	1,778,052	3,358,367	2,001,000	3,259,524	(98,843)	-3%	1,347,206	70%
Reserve for Future Expenditures	-	-	1,000,000	-	1,000,000	-	0%	1,000,000	-
Total Expense	1,957,901	1,778,052	4,358,367	2,001,000	4,259,524	(326,686)	-7%	2,347,206	
Revenues Less Expenses	1,795,549	1,914,081	-	2,377,524	-				

Notes:

Rising social and economic inflationary factors continue to impact costs of workers' compensation claims.



Risk & Safety Management

Unemployment

Purpose Statement

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

Performance Narrative Statement

SERVICES:

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

Key Performance Measures

		FY 22-23 Actuals	FY 23-24 Actuals	FY 24-25 Target	FY 24-25 Actuals as of 04/10/25	FY 25-26 Target
Output	# of Unemployment Claims.	116	217	200	162	200
Customer Service	90% of Departments agree that their share of unemployment costs are accurate and billed timely.	n/a	n/a	90%	n/a	90%
Output	# Annual Unemployment Budget	\$ 267,430	\$ 406,465	\$ 507,315	\$ 153,515	\$ 501,252

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

Performance Measures Narrative:

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

¹ New Measure, data not collected for previous FY's.

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



160504-Unemployment
 BCC Priority Alignment: Accountable Government
 Program Budget Summary

	FY22-23 Actuals	FY23-24 Actuals	FY24-25 Amended Budget	FY24-25 Projected Year-End	FY25-26 Budget	Budget-to-Budget:		Budget-to-3 Yr Avg:	
						\$ Variance	% Variance	\$ Variance	% Variance
Beginning Fund Balance	165,741	161,115	157,315	155,052	151,252	(6,063)	-4%	(9,384)	-6%
Taxes	-	-	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts	-	-	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines	262,804	400,401	350,000	350,000	350,000	-	0%	12,265	4%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-	-	-
Operating Revenue	262,804	400,401	350,000	350,000	350,000	-	0%	12,265	4%
Total Revenue	428,545	561,517	507,315	505,052	501,252	(6,063)	-1%	2,881	1%
Personnel Services	-	-	-	-	-	-	-	-	-
Materials and Services	267,430	406,465	353,800	353,800	353,800	-	0%	11,235	3%
Capital Outlay	-	-	-	-	-	-	-	-	-
Operating Expense	267,430	406,465	353,800	353,800	353,800	-	0%	11,235	3%
Debt Service	-	-	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-	-
Contingency	-	-	153,515	-	147,452	(6,063)	-4%	147,452	-
Total Appropriated	267,430	406,465	507,315	353,800	501,252	(6,063)	-1%	158,687	46%
Reserve for Future Expenditures	-	-	-	-	-	-	-	-	-
Total Expense	267,430	406,465	507,315	353,800	501,252	(12,126)	-2%	158,687	
Revenues Less Expenses	161,115	155,052	-	151,252	-				

Notes:

Unemployment ticked up significantly in FY24. Appears to be leveling out in FY25.