Employee Assistance Program

Agency Budget by Fund

Fund	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
General	396,380	473,019	463,180	479,113	497,899	497,899
Total	**396,380**	**473,019**	**463,180**	**479,113**	**497,899**	**497,899**

Agency Budget by Service

Service	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
EAP Services	396,380	473,019	463,180	479,113	497,899	497,899
Total	**396,380**	**473,019**	**463,180**	**479,113**	**497,899**	**497,899**

Agency Budget by Major-Revenue

Major Revenue	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Total	**-**	**-**	**-**	**-**	**-**	**-**

Agency Budget by Major-Expense

Major Expense	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Salaries	288,585	332,960	326,934	352,767	374,748	374,748
Benefits	96,838	110,549	111,683	118,997	114,438	114,438
Supplies	4,742	3,250	3,746	3,250	3,250	3,250
Purchased Services	50,286	69,271	57,169	66,445	71,045	71,045
Debt Othr Financing	-	-	6,560	-	-	-
Inter Depart Charges	826	825	924	932	1,008	1,008
Inter Depart Billing	(44,896)	(43,836)	(43,836)	(63,277)	(66,589)	(66,589)
Total	**396,380**	**473,019**	**463,180**	**479,113**	**497,899**	**497,899**

Employee Assistance Program
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TO: Mayor Satya Rhodes-Conway
FROM: Arlyn Gonzalez, Employee Assistance Program Manager
DATE: July 22, 2022
SUBJECT: 2023 Operating Budget Transmittal Memo
CC: Deputy Mayors; Finance Director, Budget & Program Evaluation Staff

Goals of Agency's Operating Budget

Operating budget requests should be informed by agency work plans and enable your agency to complete its core activities. What are the key goals of your agency's work plan and how will your budget request support your work plan? How do you use data and indicators to determine whether your agency is meeting its goals?

Key Goals

1. Stabilize and continue to onboard/develop EAP staff as 50% of the staff retired in 2023.
2. Reopen EAP to our "new normal", by providing both in-person and virtual services to all employees.
3. Continue to work individually with departments to identify and recognize what a critical incident looks like based on the nature of their work. Additionally, we will provide more training in how supervisors and managers can respond to critical incidents in trauma-informed ways while still aligning with their policies and procedures.
4. Start planning and preparing for an EAP sponsored Wellness Conference that will occur in 2025. This conference aims to address workplace Mental Health and reigniting wellness for the City of Madison.

Use of Data:
1. Currently, we ask employees for feedback after consultations and trainings. We use the data gathered to inform the trainings that we provide and to guide the development of our quarterly newsletter.
2. We are also planning to do an all City survey in 2025 to assess how employees are perceiving EAP services, with the goal of adjusting our services to the needs of City employees.

99% Budget for General, Library, Fleet fund agencies

The City is facing significant deficits between on-going revenues and costs-to-continue current services in the years ahead, particularly after 2024. The 2024 budget target for General, Library and Fleet fund agencies is 99% of the cost to continue projection. As a first step toward a more in-depth review of activities, agencies can meet this target through multiple strategies, such as holding positions vacant or reducing low priority spending for supplies and purchased services.

In light of these future budget challenges, how do you plan to manage to the 99% budget target in 2024 as a first step toward realizing permanent efficiencies in operations? What ideas are you considering for identifying lower priority activities, streamlining processes, coordinating with other agencies, and developing innovative approaches which would help to slow growth in costs? What short-term investments would help with realizing longer-term operating efficiencies and savings compared to current trends?

❖ EAP has limited sources where to make reductions from. The only area where we could possibly make a $5,029 reduction is in our Consulting Services line by reducing our budget for the external EAP contract in three areas that we have some control over: training, work-life services, and workgroup intervention. EAP staff would

instead offer related outside resources, some of which would charge the employee or department for their services.

❖ EAP is developing a protocol for our internal EAP staff to provide EMDR (Eye Movement Desensitization and Reprocessing) treatment for Critical Incidents that happen in the workplace, if deemed clinically appropriate. This is a short-term and specialized module to assist individuals in processing trauma. The development of this program will assist in reducing the cost of our Consulting Services, as this is currently only being provided through the external EAP, FEI. Due to capacity constraints, we will continue to rely on FEI to provide some of these services; however, having the opportunity to offer this service in-house will positively impact our budget and our participants' experience with our program.

❖ EAP is establishing a consulting network encompassed of local Mental Health Providers or Certified Critical Incident Stress Management Providers. This will also decrease the costs associated to FEI providing debriefing services as their rate also includes compensation for their travel expenses out of Milwaukee. Having this network will generate additional savings and will compliment the services we will continue to receive through FEI. This network will also enhance our partnerships with local mental health providers.

Enterprise Agencies
Not applicable for the Employee Assistance Program.

Reallocations and Other Changes (if applicable)
The Employee Assistance Program is not requesting any reallocation for 2024.

Optional Supplemental Request (if applicable)
The Employee Assistance Program does not have a supplemental request for 2024.

Service Changes - Official Request

The table below summarizes the Agency request compared to cost-to-continue. Data is based on the line item budget entered in Munis Central Budget. The table is organized by Fund, Service, and Major Expenditure/ Revenue category.

Projection Number	(Multiple Items)
	22 - EMPLOYEE ASSISTANCE
Segment 3	PROGRAM

Fund/Service/Major	Cost to Continue (C2C)	Request	Change: Request v. C2C
1100 - GENERAL	$497,899	$497,899	$0
221 - EAP SERVICES	$497,899	$497,899	$0
48 - OTHER FINANCE SOURCE	$0	$0	$0
49 - TRANSFER IN	$0	$0	$0
51 - SALARIES	$374,748	$374,748	$0
52 - BENEFITS	$114,438	$114,438	$0
53 - SUPPLIES	$3,250	$3,250	$0
54 - PURCHASED SERVICES	$71,045	$71,045	$0
56 - DEBT OTHR FINANCING	$0	$0	$0
57 - INTER DEPART CHARGES	$1,008	$1,008	$0
58 - INTER DEPART BILLING	-$66,589	-$66,589	$0

2024 Operating Budget
Service Budget Proposal Form

Instructions: Complete one form per Service. When saving the file, add the Agency and Service name to the file name. Submit by saving a copy of the proposal form in you F:/Common Drive Folder.

Part 1. Identifying Information	
Select your Agency:	EMPLOYEE ASSISTANCE PROGRAM
Enter your Service:	EAP Services
Review the "Service Description" in the 2023 Adopted Budget. Do you have any updates? ☒No – No change to description ☐Yes – Description needs to be updated	
If yes, enter updated Service Description here: Click or tap here to enter text.	
Review the "Activities Performed by Service" in the 2023 Adopted Budget. Do you have any updates? ☒No – No change to activities ☐Yes – Activities need to be updated	
If yes, enter updated Activities Performed by Service here: Click or tap here to enter text.	

Part 2. Base Budget Proposal: Significant Changes ($10,000 or more)

Agencies can propose net neutral reallocations within their budget, but must explain changes of $10,000 or more at the **Service and/or Major level**.
 	
Examples of changes that **do** need to be detailed:
    • Moving $10,000+ within a Service from one Major to another Major
    • Moving $10,000+ within a Major from one Service to another Service
 	
Examples of changes that **do not** need to be detailed:
    • Total changes of less than $10,000 at the Major and Service level.
    • Object level changes do not need additional justification if the net change to the Major is less than $10,000. For example, if you propose moving $15,000 from Consulting to Software within the Purchased Services Major, you do not need to detail the change if it is within the same Service.
 	
If your proposed changes are a technical correction to your base budget, you can simply state that the change is a correction/ adjustment in the narrative questions below.

Summary Table of *Service and/or Major* Changes of $10,000 or More

Complete the table below to detail changes at the Service and/or Major level and answer the narrative questions to describe your changes. **If you have no significant changes, skip this section**

Fund	Major	$ Change	Description
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.
Select	Select	Enter $.	Click or tap here to enter text.

Explain the impact of your proposed change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

Click or tap here to enter text.

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

Click or tap here to enter text.

Part 3. Supplemental Requests

Agencies may submit up to one (1) supplemental request to address citywide priorities or urgent needs. Before submitting a supplemental request, agencies should first examine whether they can address their needs through reallocations within the base budget or by implementing operational efficiencies. **If you are not submitting a supplemental request, skip this section.**

Describe your supplemental proposal. What citywide priority or urgent need does the proposal address? What data informed your proposal?

Click or tap here to enter text.

Estimated Costs:
- Personnel: $Click or tap here to enter text.
- Non-Personnel: $Click or tap here to enter text.
- Explain the assumptions you used to estimate costs: Click or tap here to enter text.

What efforts have you taken to reallocate resources, identify process improvements, or implement other operational efficiencies prior to submitting this request?

Click or tap here to enter text.

If funded, what performance measures will you track to determine whether the additional funding is meeting the stated goals?

Click or tap here to enter text.

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

Click or tap here to enter text.

Part 4. Personnel Changes

All proposed personnel change must be submitted for review, even if the change is net neutral. Agencies should contact their HR Analyst to discuss proposed changes prior to submitting their request. Any proposal that adds a completely new position (i.e. a position that does not have an existing classification) must include a draft job description.

If the proposed personnel changes require supplemental funding, be sure to complete "Part 3. Supplemental Request" above. **If you are not submitting personnel changes, skip this section.**

Allocation Changes: Does your proposal change the position allocations of existing positions?
☒ No – No allocation changes
☐ Yes – Includes proposed allocation changes

If yes, complete the "Position Allocation Change Form" and submit as part of your proposal.

Reclassifications: Does your proposal reclassify existing positions?
☒ No – No reclassifications
☐ Yes – Includes proposed reclassifications

If yes, provide the position number and briefly describe the change:
Click or tap here to enter text.

# of FTEs: Does your proposal change the total number of FTE positions for an existing classification?
☒ No – No change to # of FTEs
☐ Yes – Includes proposed change to # of FTEs

If yes, provide the position classification and briefly describe the change:
Click or tap here to enter text.

New Positions: Does your proposal create a new position? (i.e. position with no existing classification)

☒No – No new positions

☐Yes – Includes proposed new positions

If yes, submit a draft position description with your proposal and briefly describe the change here:
Click or tap here to enter text.

Explain the impact of your proposed personnel change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

Click or tap here to enter text.

Explain how your proposed personnel change(s) will align with your draft Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals?

Click or tap here to enter text.