

Human Resources

Agency Budget by Fund

Fund	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
General	1,615,348	1,707,959	1,921,041	2,081,158	2,088,879	2,088,879
Total	1,615,348	1,707,959	1,921,041	2,081,158	2,088,879	2,088,879

Agency Budget by Service

Service	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Employee & Labor Relations	445,547	654,911	763,704	700,304	877,183	877,183
HR Services	552,515	411,480	538,487	680,376	321,080	321,080
Organizational & Health Devel	617,285	641,568	618,850	700,478	890,617	890,617
Total	1,615,348	1,707,959	1,921,041	2,081,158	2,088,879	2,088,879

Agency Budget by Major-Revenue

Major Revenue	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Charges For Services	(3,250)	-	(25)	-	-	-
Misc Revenue	(10)	(4,000)	-	-	-	-
Total	(3,260)	(4,000)	(25)	-	-	-

Agency Budget by Major-Expense

Major Expense	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Salaries	1,554,733	1,615,056	1,707,128	1,874,395	1,915,541	1,915,541
Benefits	442,486	460,942	571,256	503,864	507,605	507,605
Supplies	11,940	18,950	29,194	18,950	18,950	18,950
Purchased Services	128,926	210,411	175,837	242,951	253,151	253,151
Debt Othr Financing	-	-	7,212	-	-	-
Inter Depart Charges	84,625	84,625	108,464	71,253	70,599	70,599
Inter Depart Billing	(604,103)	(678,025)	(678,025)	(630,255)	(676,967)	(676,967)
Total	1,618,608	1,711,959	1,921,066	2,081,158	2,088,879	2,088,879



Human Resources Department

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hr@cityofmadison.com
cityofmadison.com/human-resources

July 30, 2023

TO: Mayor Satya Rhodes-Conway
FROM: Erin Hillson, Human Resources Director
DATE: July 21, 2023
SUBJECT: 2024 Operating Budget Transmittal Memo
CC: Deputy Mayors; Finance Director, Budget & Program Evaluation Staff

Goals of Agency's Operating Budget

The Human Resources Department supports the city-wide goal of sustaining an effective and efficient government by meeting the four following objectives:

1. Attract a talented and diverse workforce.
2. Retain an engaged and diverse workforce where all employees feel they belong.
3. Develop our employees and organization to be an inclusive and high performing City.
4. Implement innovative and progressive Human Resources practice.

Beginning in 2023 we implemented our first long-term strategic plan which lays out strategies we will build on in each of the next four years. Using current funding levels we are meeting goals this year that include: designing and purchasing a Human Resources Management system for more effective orientation, onboarding, and professional development of current employees; redesigning our wage and life insurance plans; contracting for a full organizational classification and compensation study; creating a new recruitment planning guide and targeted recruitment strategies; rewriting the City's Personnel Rules; and implementing new evaluation tools including the executive 360 Review process.

Granted the funding requested in this proposal, during 2024 the Human Resources Department will complete implementation of phase one of the Human Resources Management system; complete the city-wide compensation and classification study; implement a full customizable marketing and outreach plan for effective recruitment; create and implement a customer service satisfaction survey, consolidate employee facing surveys and standardize survey action plans to ensure accountability; and create pathways to employment processes with City workforce development partners.

The Human Resources Department provides City agencies with crucial support in three service areas:

- The **HR Services** unit partners with agencies in the workforce recruitment process and manages the City's classification and compensation systems, including oversight of the position study process and assistance in implementing organizational changes. Additionally, this unit works closely with the City's Personnel Board and maintains the City's Position Control Program.
- The **Employee & Labor Relations** unit plans and implements the Employee Benefits Program, administers the Occupational Accommodations Program, oversees and supports employees requesting Family Medical Leave and Disability Leave, coordinates investigations of grievances and complaints, as well as represents the City during bargaining and "Meet and Confer" sessions

with employee associations and unions. Additionally, this unit serves as an advisor to managers and supervisors in areas of conflict resolution and performance management.

- Finally, the **Organizational Development** unit promotes organizational development and performance excellence by collaborating with city agencies to create opportunities for advancements to work culture and operations, to improve operational efficiency, and support staff to achieve shared goals. This unit focuses on employee training, Leadership Development, process improvement, building organizational capacity, and performance excellence.

99% Budget for General, Library, Fleet fund agencies

Given the Human Resources budget is predominately employee salaries and benefits, the required 1% budget reduction will come from our Conferences & Training and Performance Excellence (Consulting Services) budget lines. Together the total Cost to Continue amount for these budget lines would be \$111,000. The Department's required reduction is \$21,000. The resulting impact to Conferences & Training and Performance Excellence is a reduction of approximately 20%.

The services provided through these budget lines include:

- Internal and external voice of the customer survey development and implementation
- Consultation to agencies in Executive Team Development
- Leadership training and evaluation services
- Standardized work planning
- Training development and evaluation related to key services and expectations like data management, communication, performance management, gender equity, and racial equity and social justice
- Change management training and consultation

Consequently, this 1% reduction will create city-wide impacts; limiting work directed toward proactively designing, developing, and delivering effective human resources systems and tools to serve our workforce and achieve a healthy and sustainable organization. If we experience any unanticipated vacancies, we would intend to use salary savings prior to utilizing Performance Excellence and Conference and Training funding.

Reallocations and Other Changes

Our 2024 Operating Budget request builds on 2023 goals and continues the work we started in implementation of the full classification and compensation study, as well as a new Human Resources Management system. This budget seeks to maintain current internal service levels related to Employee and Labor Relations and Organizational Development, with only two **budget neutral** staffing modifications.

In order to facilitate effective implementation of the new Human Resources Management system including a new Orientation, Onboarding, and Learning Management system, Human Resources requests the following position modifications and funding reallocations:

- 1) The Organizational Development section will reclassify one Learning and Development Specialist (CG 18/12, PCN#4703) and one Program Assistant (CG 20/11, PCN#870) to one Human Resources Analyst 3 (CG 18/10) and one Human Resources Analyst Trainee (CG 18/4). The budgetary impact of these changes is a cost reduction of approximately \$4300.

This will allow for the ideal balance of programmatic work in Learning and Development given our shift from manually developed and tracked learning management to implementation of a more sustainable and user friendly learning management platform. \$4000 of the expected cost savings should remain on the Organizational Development salaries budget line to meet our requested 1% reduction. If 2024 mid-year projections indicate that we will exceed the 1% reduction goal, we would anticipate reallocating the additional funding to the Organizational Development Conference and Training budget line to further aid the transition to a new employee learning model, while still maintaining a neutral budget impact.

The remaining \$300 of cost savings should be used to offset the minor cost increase resulting from the second staffing modification described below.

- 2) As is evident in our Strategic Plan, Human Resources has committed to and already begun significant modernization efforts. To support these efforts additional changes within the Employee and Labor Relations section are necessary. The current structure in Employee and Labor Relations is inadequate in addressing needs related to the research, design, development, and implementation of the City's employee Benefits Program. Currently, the City's Benefits Program is managed by a Human Resources Analyst 1 who reports directly to the Employee and Labor Relations Manager and works alongside of two Program Assistants who administer all of the City's FMLA and Leave programs, and provide administrative support to the Human Resources Analyst.

In 2024, Human Resources anticipates one retirement in the Employee and Labor Relations unit, and so seeks to subsequently upgrade the Benefits Human Resources Analyst 1 position (CG 18/06, PCN#877) to a newly created classification of Human Resources Analyst 4 (18/12), at this level the employee will be expected to bring a high level of expertise in the creation and efficient management of employee benefit programs. The individual will exercise independent Benefits Program oversight under the Employee and Labor Relations Manager. This change will allow for the Benefits Specialist to now:

- Research, design and implement new and efficient benefits options for City of Madison employees
- Work independently on the administration of City benefits including wage, life, and health insurance, retirements, pension, dental insurance, and other benefits programs
- Oversee the two Program Assistants who implement and administer City benefits programs
- Create a layer of administrative oversight between the Employee and Labor Relations Manager and Program Assistants who support benefits

This future system will minimize liabilities by separating work functions, improving transparency, and creating an administrative buffer between the individuals that directly administer state and federally required leave programs and those who administer oversight of the performance management and disciplinary system.

Due to the substantial reduction in longevity pay which the retirement affords, the estimated personnel cost increase for this reclassification is \$300.

In alignment with the Mayor's budget directives, these modifications will better position the Human Resources Department to achieve our goals with **no increase in FTEs and no additional funding required**. Data that could be useful in measuring the impact of this change would include:

- Administrative costs associated with City benefits programs
- Customer Service metrics
- Time studies related to the day to day activities of Program Assistants and efficiencies created in administration

Optional Supplemental Request

No supplemental budget request for 2024 is included.

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)
	16 - HUMAN
Segment 3	RESOURCES

Fund/Service/Major	Cost to Continue (C2C)	Request	Change: Request v. C2C
1100 - GENERAL	\$2,088,879	\$2,088,879	\$0
162 - EMPLOYEE & LABOR RELATIONS	\$877,183	\$877,183	\$0
51 - SALARIES	\$680,358	\$680,358	\$0
52 - BENEFITS	\$190,545	\$190,545	\$0
53 - SUPPLIES	\$1,000	\$1,000	\$0
54 - PURCHASED SERVICES	\$103,616	\$103,616	\$0
56 - DEBT OTHR FINANCING	\$0	\$0	\$0
57 - INTER DEPART CHARGES	\$3,966	\$3,966	\$0
58 - INTER DEPART BILLING	-\$102,302	-\$102,302	\$0
161 - HR SERVICES	\$321,080	\$321,080	\$0
43 - CHARGES FOR SERVICES	\$0	\$0	\$0
48 - OTHER FINANCE SOURCE	\$0	\$0	\$0
49 - TRANSFER IN	\$0	\$0	\$0
51 - SALARIES	\$647,670	\$647,670	\$0
52 - BENEFITS	\$178,544	\$178,544	\$0
53 - SUPPLIES	\$16,100	\$16,100	\$0
54 - PURCHASED SERVICES	\$48,935	\$48,935	\$0
57 - INTER DEPART CHARGES	\$4,495	\$4,495	\$0
58 - INTER DEPART BILLING	-\$574,665	-\$574,665	\$0
59 - TRANSFER OUT	\$0	\$0	\$0
163 - ORGANIZATIONAL & HEALTH DEVEL	\$890,617	\$890,617	\$0
42 - INTERGOV REVENUES	\$0	\$0	\$0
43 - CHARGES FOR SERVICES	\$0	\$0	\$0
47 - MISC REVENUE	\$0	\$0	\$0
51 - SALARIES	\$587,513	\$587,513	\$0
52 - BENEFITS	\$138,516	\$138,516	\$0
53 - SUPPLIES	\$1,850	\$1,850	\$0
54 - PURCHASED SERVICES	\$100,600	\$100,600	\$0
57 - INTER DEPART CHARGES	\$62,138	\$62,138	\$0
58 - INTER DEPART BILLING	\$0	\$0	\$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:	HUMAN RESOURCES
Enter your Service:	Employee and Labor Relations
Review the "Service Description" in the 2023 Adopted Budget . Do you have any updates?	
<input checked="" type="checkbox"/> No – No change to description <input type="checkbox"/> Yes – Description needs to be updated	
<i>If yes, enter updated Service Description here:</i>	
Click or tap here to enter text.	
Review the "Activities Performed by Service" in the 2023 Adopted Budget . Do you have any updates?	
<input checked="" type="checkbox"/> No – No change to activities <input type="checkbox"/> Yes – Activities need to be updated	
<i>If yes, enter updated Activities Performed by Service here:</i>	
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:
<ul style="list-style-type: none"> 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:
<ul style="list-style-type: none"> 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.
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Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
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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.

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: \$ 0

- 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?

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

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.

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:

PCN# 877 change from Human Resource Analyst-1 to new class of Human Resource Analyst-4

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?

Human Resources provides a full range of employee benefits including health and dental insurance, long and short term disability insurance, life insurance, pet insurance, pension, flexible spending, deferred compensation, paid parental leave, post employment health care, family and medical leave, and disability leave and layoff.

Currently, we have two Program Assistants and one HR Analyst 1 completing all of the work necessary to manage these programs, and to research, design, and implement all programs under the general direction of the Employee and Labor Relations Manager. With one expected vacancy in 2024 in this unit, this change would convert the HR Analyst 1 to an HR Analyst 4 to allow us to streamline and improve processes, shift supervision of the Program Assistant function under the Benefits Analyst, and to provide necessary analysis, research, and design of benefit programs to enhance benefits with lower administrative costs.

Because this vacancy is not expected until mid-2024, and the adjustment comes with a retirement that eliminates 9% longevity, the total annualized cost is only \$300, which will be reallocated from savings expected in Organizational Development salaries.

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?

This funding is intended to improve our ability to meet agency expectations related to core functions of benefits administration. Our goals are to attract and retain a talented and diverse workforce where all employees feel they belong and to develop our employees and organization into an inclusive and high performing City where we implement innovative and progressive Human Resources practices. This requires that we utilize staff who are capable of high level benefits analysis and can independently research, design, and implement innovative and sustainable benefits solutions, and improving transparency and accountability in federally protected leave administration.

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Part 1. Identifying Information	
Select your Agency:	HUMAN RESOURCES
Enter your Service:	HR Services
Review the "Service Description" in the 2023 Adopted Budget . Do you have any updates?	
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<i>If yes, enter updated Service Description here:</i>	
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Select	Select	Enter \$.	Click or tap here to enter text.

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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: \$ 0

- 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?

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

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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:

Learning & Development Specialist, PCN#4703; will become a Human Resource Analyst-3
 Program Assistant, PCN#870; will become a Human Resources Analyst Trainee (18/4)
 These changes should result in a cost savings of approximately \$4300.

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?

Our 2024 Operating Budget request builds on 2023 goals and continues the work we started in implementation of the full classification and compensation study, as well as a new Human Resources Management system.

In order to facilitate effective implementation of the new Human Resources Management system including a new Orientation, Onboarding, and Learning Management system, Human Resources funding in the Organizational Development Learning and Development section to shift from one Learning and Development Specialist (CG 18/12) and one Program Assistant (CG 20/11) to one Human Resources Analyst 3 (CG 18/10) and one Human Resources Analyst Trainee (CG 18/4). The budgetary impact of these changes is a cost reduction of approximately \$4300.

This will allow for the ideal balance of programmatic work in Learning and Development given our shift from manually developed and tracked learning management to implementation of a more sustainable and user friendly learning management platform. \$4000 of the personnel cost reductions should be remain on the Organizational Development permanent salaries line to potentially meet the requested 1% reduction. The remaining \$300 of cost savings should be used to offset the minor cost increase resulting from the reclassification in Employee and Labor Relations.

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?

This re-allocation allows us to meet growing needs in Learning and Development with purchase of a Human Resources Management System. The intent is to create an environment with high employee engagement where employees feel they can learn, grow, and develop in an equitable way. This workforce development effort is intended to lead to improvement in recruitment and retention efforts toward a more sustainable organization.