

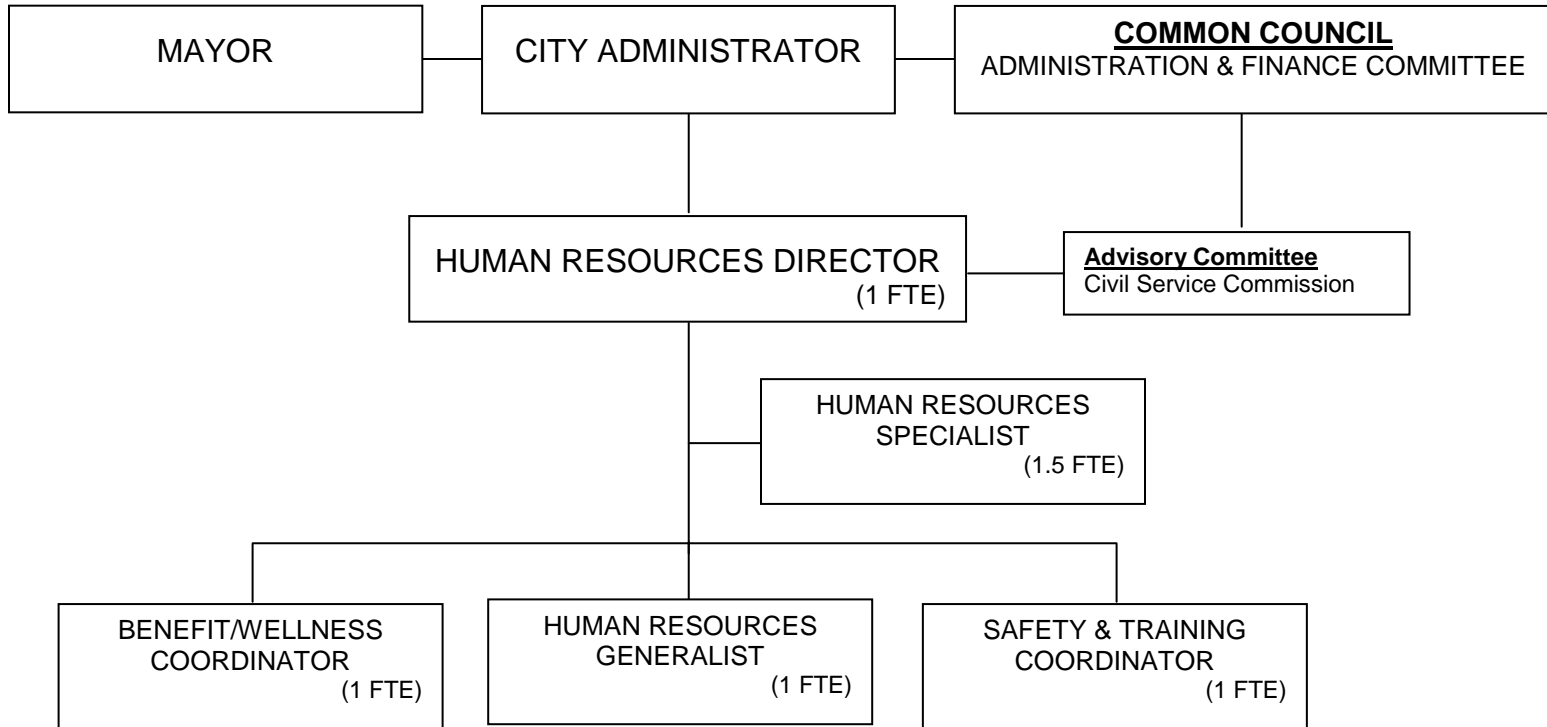
City of West Allis  
Human Resources  
2017 Budget

<i>EXPENDITURES</i>	2015 Actual	2016 Actual	2017 Budget	2017 Adjusted Budget	2017 Year-to-Date	2018 Request	2018 Additions/ Deletions	2018 Budget	Change	% Change
Salaries	\$ 313,030	\$ 320,188	\$ 317,678	\$ 317,678	\$ 197,978	\$ 317,346	\$ -	\$ 317,346	\$ (332)	
Misc Other Pay	\$ 1,568	\$ 1,481	\$ 1,750	\$ 1,750	\$ 1,047	\$ 1,750	\$ -	\$ 1,750	\$ -	
Overtime	\$ 2,738	\$ 1,627	\$ 2,450	\$ 2,450	\$ (1,090)	\$ 1,700	\$ -	\$ 1,700	\$ (750)	
Payroll Taxes	\$ 23,530	\$ 23,958	\$ 24,302	\$ 24,302	\$ 14,653	\$ 23,939	\$ -	\$ 23,939	\$ (363)	
Pension	\$ 26,818	\$ 27,118	\$ 21,602	\$ 21,602	\$ 14,175	\$ 21,262	\$ -	\$ 21,262	\$ (340)	
Health Insurance	\$ 74,828	\$ 54,011	\$ 67,620	\$ 67,620	\$ 39,220	\$ 65,851	\$ -	\$ 65,851	\$ (1,769)	
Dental Insurance	\$ 3,830	\$ 4,118	\$ 4,320	\$ 4,320	\$ 1,978	\$ 4,099	\$ -	\$ 4,099	\$ (221)	
Life Insurance	\$ 906	\$ 1,007	\$ 540	\$ 540	\$ 642	\$ 1,141	\$ -	\$ 1,141	\$ 601	
Professional Services	\$ -	\$ -	\$ 2,000	\$ 2,000	\$ -	\$ 2,000	\$ -	\$ 2,000	\$ -	
Maintenance Contracts	\$ 608	\$ 90	\$ 100	\$ 100	\$ 25	\$ 100	\$ -	\$ 100	\$ -	
Utilities	\$ 118	\$ 249	\$ 150	\$ 150	\$ 293	\$ 1,100	\$ -	\$ 1,100	\$ 950	
Supplies	\$ 3,192	\$ 5,642	\$ 5,265	\$ 5,265	\$ 3,001	\$ 4,865	\$ -	\$ 4,865	\$ (400)	
Books & Periodicals	\$ -	\$ 42	\$ -	\$ -	\$ -	\$ 65,223	\$ -	\$ 65,223	\$ 65,223	
Advertising	\$ 8,418	\$ 18,792	\$ 7,000	\$ 7,000	\$ 6,166	\$ 20,000	\$ -	\$ 20,000	\$ 13,000	
Printing	\$ 944	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Training & Travel	\$ 5,521	\$ 5,057	\$ 7,050	\$ 7,050	\$ 5,442	\$ 7,350	\$ -	\$ 7,350	\$ 300	
Regulatory & Safety	\$ 116	\$ 116	\$ 1,150	\$ 1,150	\$ 116	\$ 1,150	\$ -	\$ 1,150	\$ -	
Capital Items	\$ -	\$ -	\$ -	\$ 101,000	\$ 23,223	\$ -	\$ -	\$ -	\$ -	
<b>TOTAL EXPENDITURES</b>	\$ 466,165	\$ 463,497	\$ 462,977	\$ 563,977	\$ 306,870	\$ 538,876	\$ -	\$ 538,876	\$ 75,899	16.39%

**2018 BUDGET NOTES:**

Books & Periodicals expense category also includes "subscriptions". The \$65,223 increase in this account for 2018 includes a software subscription for Benefit Administration software  
Advertising increase to reflect anticipated higher costs for recruitment due to overall city staff turnover

**ORGANIZATIONAL CHART  
HUMAN RESOURCES**



CITY FUNDED FTEs: 4.5  
OTHER FUNDING SOURCES FTEs: 1.0

# 2018 HUMAN RESOURCES BUSINESS PLAN

Department	Director	Fund and Dept. Group
Human Resources	Audrey Key	100.1301-1307

<b>Mission/Overview</b>
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### HR Mission Statement

The HR Department strategically partners with City departments to hire, compensate, support, and develop a diverse workforce to deliver high-quality services to our community. To that end, we are committed to being accountable, professional, and responsive to all prospective, current, and past employees, and citizens of the City.

**The HR Department supports the City’s Mission, Vision and Strategic Plan by:**

- Partnering with City-wide leaders in...
  - providing direction on the local and global labor market, and impact on City operations;
  - developing staff in order for the City to be successful in achieving its Vision, Mission, and business strategy;
  - managing risk, opportunities, and gaps in business strategy;
  - maintaining or changing organizational culture.
- Fostering collaboration among City-wide stakeholders (e.g., Council, Mayor, City Administrator, Department Heads/supervisory staff, employees);
- Developing solutions to overcome potential obstacles thereby leading to successful implementation of initiatives such as:
  - applying creative problem-solving to address business needs and issues;
  - serving as an in-house expert on people management;
  - providing consultative and coaching services;
  - maintaining openness to others’ ideas and making decisions based on experience, data, facts and reasoned judgment.
- Demonstrating agility and expertise in leading organizational initiatives as well as supporting the initiatives of others where applicable;
- Understanding the most effective and efficient ways to accomplish tasks within the parameters of the tools/resources provided by the City and the organizational hierarchy, processes, systems, and policies:
  - making sound decisions based on evaluation of available information;
  - transferring knowledge and best practices from one situation to the next;
  - gathering critical information and analyzing data with a keen sense for what is useful;
  - challenging assumptions and analyzing information to make effective decisions.
- Exhibiting behaviors consistent with the City’s organizational culture and acting with personal, professional, and behavioral integrity:
  - fostering a culture that supports intra-organizational relationships;
  - aligning all HR practices with ethics, laws, and standards;
  - treating all customers (internal and external) with respect and dignity, including maintaining confidentiality, demonstrating nonjudgmental respect for others’ perspectives, and embracing diversity;
  - managing political and social pressures when making decisions and taking measures to mitigate the influence of bias in business decisions;
  - balancing organizational success and employee advocacy.
- Communicating proactively, providing clear, concise information to others in verbal, written, electronic, and other communication formats for internal and external consumption.
- Soliciting feedback to evaluate for changes and improvements.

## Performance Measures

In order to streamline or provide more efficient HR services, automation solutions are needed. The following two (2) measurements are deemed relevant in supporting the need for automation:

1. Personnel Action Form (PAF) – measure the average time to process a PAF:

Baseline - 2012: 272 PAFs processed \* average<sup>1</sup> of 8 minutes 22 seconds/PAF = 37 hours 56 minutes

2015: 555 PAFs processed \* average of 8 minutes 22 seconds/PAF = 77 hours 23 minutes

2016: 534 PAFs processed \* average of 8 minutes 22 seconds/PAF = 74 hours 27 minutes

2. Benefits Administration: Employee/Retiree Change in Status – measure the average time to process a change in status request:

Baseline - 2012: 360 Change in Status requests processed \* average<sup>1</sup> of 9 minutes 57 seconds/request = 59 hours 42 minutes

2015: 345 Change in Status requests processed \* average of 9 minutes 57 seconds/request = 57 hrs 13 min

2016: 304 Change in Status requests processed \* average of 9 minutes 57 seconds/request = 50 hrs 25 min

<sup>1</sup> Interruptions are not factored in to length of time to complete a step however computer system processing time (i.e., computer “thinking”) is included.

A performance measurement for recruitment application form processing was utilized to support the implementation of NeoGov’s “Insight”, an applicant tracking system. Current efforts are underway in regards to an electronic solution for the Benefit Administration efficiency issues (i.e., BenAdmin software review is occurring through the collaborative efforts of HR, Finance, the City Administrator, and the City’s benefit consultant, WTW). The HR Department remains hopeful that the PAF efficiency issue is relooked at via the IT Steering Committee; it would not only improve the efficiency of HR staff but also of every Department, City-wide.

Please note, these performance measurements are considered operational reporting mechanisms. As indicated in the Mission/Overview section, the HR Department strives to be a strategic business partner not seen in the traditional sense of Personnel/HR operations as “those people who take care of benefits and transactional kind of work”. The addition of the HR Generalist position in 2017 is a step towards providing the HR Team the staff time to execute strategic functions. Industry standard indicates a 1.0 to 1.1 HR staff member to employee ratio should be maintained by an organization to provide appropriate levels of HR service. With the addition of the HR Generalist position, the City is at a 0.73 ratio (4 professionals and 1.5 support staff for 580 FTEs and 170 misc. part-time staff per 2017 budget); if the ~600 retirees serviced by the HR Department are taken into account, the ratio drops to 0.41. A recent study by a WPELRA (WI Public Employer Labor Relations Association) member indicates the average HR staff member to employee ratio for cities within WI is 0.82 (Attachment 1).

### Position Information\*

Titles	Number	Funding Source(s)
HR Director	1	100.1301
Safety & Training Coordinator	1	100.1301
HR Generalist	1	100.1301
HR Specialist	1.5	100.1301
Benefit/Wellness Coordinator	1	602.5601

### Vacant Positions\*

Title	Length of Vacancy	2018 Plan/Current Status
N/A		

Services Provided*					
Service	Funded by	Frequency	Shared Service <i>(list Partners)</i>	Contracted	Statutory <i>(Federal, State, Local)</i>
For a more detailed listing see Attachment 2					Aspects are regulated by statutory/legal oversight:
Benefit Administration	100.1301-1307				State, federal
Classification/Compensation	100.1301-1307				State, federal
Employee/Labor Relations	100.1301-1307				State, federal
Employment Law and Regulations oversight/compliance	100.1301-1307				State, federal
General HR Administration	100.1301-1307				State, federal
Talent Acquisition (Recruitment & Selection) and Retention	100.1301-1307				State, federal
Safety Program	100.1301-1307				State, federal
Training and Development	100.1301-1307				State, federal
Worker's Compensation Program	100.1301-1307				State, federal

**1. Strategic Plan Goal #5 – Excellence in Government, calls for operational analysis/audit/alternative service delivery options, continuous improvement and a culture of innovation. To assist with accomplishing this goal, identify the top three services provided (by time or money spent) and 2018 efforts to improve service delivery (quality and/or resources allocated)**

**Top 3 Services Provided**

**2018 Efforts to Improve Service Delivery**

1. Benefit Administration

- Wellness Program – strategic plan, outcomes based programming; HRA electronic solution; customizable wellness portal w/mobile solution.
- BenAdmin software system implementation.
- New Benefit Consultant.
- Total Rewards statements – in collaboration w/Finance Department.
- Collaborate with Finance Department in analyzing current electronic systems (such as HTE's Payroll program and/or NovaTime) for tracking of FMLA usage vs. use of Excel spreadsheet.

2. Safety and Training (including Worker's Compensation Program)

- Promote HR training/employee development efforts.
- Continue (1) Worker's Comp Program cost containment efforts, (2) risk management oversight; (3) employee and supervisory enrichment training/development.

3. Talent Acquisition (Recruitment & Selection) and Retention

- Implementation of Civil Service System update.
- Promote career path and advancement education/counseling services.
- Facilitate new performance management process.
- Enhance Onboarding/Exiting Process via NeoGov's Onboard.
- Implement a computer kiosk in HR for applicants use in applying for openings/completing online application materials.
- Update Employee Handbook.

**2. Describe any additional proposed changes to service delivery. (new initiatives should be documented on the new initiative form)**

Collaborative effort with City Administrator, consultant, and Departments on Employee Engagement and Performance Management System implementation.

Implementation of a computer kiosk in the HR Office to provide accessibility for individuals to the online application process (new initiative - Attachment 3).

**3. 2017 Accomplishments (include Strategic Plan and other approved plans accomplishments)**

NOTE: This listing includes continuous improvement activities; activities focused on City's Strategic Plan Goal 5

- Active members of the newly created/implemented Employee Benefit Committee and Service Action Delivery Team.

Continued

2017 Accomplishments continued:

- Benefit Consultant RFP; collaborative effort with CA and Finance Department.
- Civil Service System conversion undertaking; collaborative effort with Attorney's Office.
- Class/Comp Study undertaking; collaborative effort with CA, consultant, Finance Department, and City-wide Departmental administrative staff.
- Mitigation of various potentially costly employment matters (ranging from harassment/bullying allegations, suicidal situation, WC fraud, under the influence of alcohol, FMLA/fit for duty, involuntary termination, ADA accommodations); collaborative effort with Attorney's Office and departmental administrative staff.
- EEOC Reporting requirement.
- Employee Engagement undertaking - Q12; Recognition Program survey (ERD, Suggestion Award, Other); collaborative effort with CA, consultant, and Communications Department.
- Financial Wellness program; collaborative effort with Communications Department.
- HR Team building (CliftonStrengths Assessment).
- Implementation of new position and onboarding of new team member (HR Generalist).
- Professional Development of HR Team (training; professional organizations).
- Recruitment (continued exploration/implementation of advertising outlets; enhancements to job announcement; implementation of Biddle recruitment testing software; participation in various career fairs, and talent acquisition program through Bus Journal; Talent Acquisition video [placed on hold due to branding/marketing undertaking of City]; update to application form); collaboration with Communications Department.
- Review/Implementation of electronic solutions (BENEFITS: BenAdmin [reviewing]; RECRUITMENT: NeoGov Insight [at final stages of implementation]; ORIENTATIONS: NeoGov Onboard [to be implemented]; PERFORMANCE REVIEW: NeoGov Perform [to be implemented in conjunction with performance review undertaking]).
- Scanning of archived documents; collaborative effort with Communications Department-Creative Services' staff.
- Transition of Wellness Program from Health Department and coordination of Employee Benefit Advisory and Wellness Committee.
- Worker's Compensation Program cost containment (Trilogy/Access HealthNet and TAHPI provider network programs; occ med partnership – QuadMed; pre-emptive measures for occ disease claims); collaborative effort with TPA.

#### **4. 2018 Priorities/Goals (include Strategic Plan and other approved plans goals)**

Continued focus on City's Strategic Goals as they relate to HR operations (e.g., Goal 4-5 electronic solutions for efficiency, 5-1 performance standards, 5-2 knowledge of organizational operations, 5-4 align goals with all departments, 5-5 ongoing operational analysis, 5-6 streamline hiring, retention, performance recognition) and collaboration with City-wide stakeholders (e.g., Council, Mayor, City Administrator, Department Heads/supervisory staff, employees).

Listed alphabetically:

- BenAdmin software implementation;
- Benefit Consultant onboarding;
- Civil Service System conversion implementation;
- Employee Benefit Committee (potential benefit conversion [i.e., PTO] and retiree insurance program undertakings);
- Employee Engagement and Performance Review/Employee Development undertaking including the implementation of NeoGov Perform software;
- Employee Handbook and HR Policies/Procedures update;
- JDQs/Position Descriptions;
- Onboarding process and implementation of NeoGov Onboard software;
- Promote HR training/employee development, including career path and advancement education/counseling services;
- Protective Service CBA negotiations;
- Service Delivery Action Team activities;
- Talent Acquisition/Recruitment enhancement efforts;
- Wellness Program – strategic plan, outcomes based programming.

1. Addresses and coordinates disciplinary actions, terminations for cause, employee issues/grievances/arbitrations, and related matters.
2. Administers Affirmative Action/EEO/LEP (limited English proficiency) programs.
3. Administers and processes FMLA.
4. Administers and processes unemployment compensation claims.
5. Administers, processes, and coordinates workers' compensation program and claims.
6. Agent for the Civil Service Commission.
7. Provides all aspects of benefit administration, including:
  - a. legislative enactment/enforcement/communication (such as federal and State health care reform measures);
  - b. communication and interpretation of benefits, guidance/counseling, billing, enrollment, new/exiting employee orientations, insurance claims liaison, change of status, etc.;
  - c. liaison with insurance consultant;
  - d. liaison between the City's employee Wellness Program and insurance and safety programs;
  - e. administers retiree health insurance program.
8. Conducts and coordinates employee training and educational programs related to employment practices, safety, loss control, risk mitigation, employee development, retirement, etc.
9. Conducts labor union negotiations for two (2) protective service bargaining units.
10. Conducts recruitment and selection of employees.
11. Coordinates and administers City-wide ID Card program.
12. Coordinates and administers employee suggestion award program.
13. Coordinates and provides administrative oversight of Safety Data Sheets for all products/materials used throughout the City.
14. Coordinates and provides administrative oversight of the performance review process.
15. Coordinates annual Combined Giving Campaign.
16. Coordinates City's medical surveillance program for employment and occupational health and safety compliance.
17. Coordinates CVMIC website administration.
18. Coordinates employee years of service recognition program.
19. Coordinates/Administers position evaluation system.
20. Investigates property/traffic, citizen and employee injuries and accidents.
21. Maintains information and data systems, including but not limited to, HRIS, insurance data base, Intranet, HR section of website, etc.
22. Maintains position classifications, compensation and salary review.
23. Oversees compliance with all federal and State employment laws, City policies, etc.
24. Plans, directs and coordinates safety, loss prevention, and risk management and federal/state mandated training.
25. Prepares and maintains City-wide organizational chart.
26. Processes all personnel actions.
27. Provides employment verifications and reference checks for current/past employees.
28. Provides for employee and supervisory counseling and referral, career planning, and the employee assistance program (EAP).

# 2018 WELLNESS BUSINESS PLAN

Department	Director	Fund and Dept. Group
Wellness Program (HR)	<u>Daily Supervision:</u> HR Director  <u>Overall Program Oversight:</u> Employee Benefit Committee/Employee Benefit Advisory & Wellness Committee under the direction of the City Administrator	602.5601 (Health Fund)

## Mission/Overview

In order to provide fiscally responsible administration of benefits and provide opportunity for employee input, the Employee Benefit Committee and Employee Benefit Advisory and Wellness Committee were established in 2017.

Both Committees operate cooperatively and under the direction of the City Administrator to ensure benefit and wellness planning maintains congruence with overall City operational and strategic plans and effective and efficient use of City resources.

The City's Benefit/Wellness Coordinator, HR Department, administers the Wellness Program under the guidelines established for these Committees as outlined in Policy 1413 Health/Dental Insurance:

Employee Benefit Committee (EBC). The City will establish an Employee Benefit Committee which will, in partnership with the City's Insurance Consultant, explore, review, develop and recommend (for Common Council action) best practice approaches, policies and procedures relating to employee benefits. The Committee will develop, execute and update a long term strategic plan for benefit and wellness programs.

EBC Members. Membership of the Employee Benefit Committee will include: 1) Alderperson appointed by the Common Council President, 2) Member of the Administration and Finance Committee appointed by the Chair, 3) City Administrator, 4) Human Resources Director, and 5) Finance Director. The City Attorney or designee, Deputy Finance Director, and Benefits and Wellness Coordinator will serve as resource staff for the Committee.

Employee Benefit Advisory and Wellness Committee (EBAWC). The City will establish an Employee Benefit Advisory and Wellness Committee which will: 1) function in an advisory capacity for the Employee Benefit Committee; and 2) strive to increase employee wellness and reduce health risks through awareness, education, support and outcomes- based wellness activities. The Committee will convene to provide input and feedback relating to employee benefit plans, offerings, long term planning and other assistance as may be requested from the Employee Benefit Committee. The Committee will serve as a sounding board for initiatives and efforts underway and facilitate communication as requested among City employees. The Committee will develop goals and objectives consistent with the long term strategic plan for benefit and wellness programs and deliver programs which effectuate the goals and objectives. The Committee shall establish short and long term wellness plans (for Common Council action).

EBAWC Members. Membership of the Employee Benefit Advisory and Wellness Committee will include: 1) City Administrator or designee, 2) Human Resources Director, 3) Benefits and Wellness Coordinator (chairperson), 4) Finance Director or designee, 5) Communications Director or designee, 6) Safety and Training Coordinator, 7) Health Department Employee\*, 8) Public Works Employee\*, 9) Library Employee\*, 10) Fire Department Employee\*, and 11) Police Department Employee\*.

*\*Appointed by respective Department Head and will serve two year terms.*

Criteria for EBC and EBAWC Activities. Consideration of the following will guide the Committees' activities (listed by order of importance): 1) Fiduciary responsibility to the taxpayer, 2) Cost control, 3) Reduction of OPEB liability (other postemployment benefits), 4) Optimal member health, 5) Positive customer service experience, 6) Recruitment, retention, and uniformity of benefits amongst employee groups, 7) Offerings provided by similar organizations.

Continued



EBC and EBAWC Members' Roles and Responsibilities. Committee members' roles and responsibilities shall include, but not be limited to: 1) Actively participate in Committee activities including meetings, 2) Ensure adherence to the criteria listed herein, 3) Respect the sensitivity and maintain confidentiality of information provided, 4) Act as a liaison between the Committee and employees, 5) Provide constructive feedback, 6) Support and implement (as applicable) Committee agreed upon recommendations and recommendations approved by the Common Council. Failure to adhere to membership roles and responsibilities will result in removal from the Committee.

**Performance Measures**

These will be established upon the implementation of the Wellness Program's strategic plan, focusing on outcomes based programming, as developed by the EBC/EBAWC.

**Position Information\***

<i>Titles</i>	<i>Number</i>	<i>Funding Source(s)</i>
Benefits/Wellness Coordinator	1	602.5601

<b>Vacant Positions*</b>		
<i>Title</i>	<i>Length of Vacancy</i>	<i>2018 Plan/Current Status</i>
N/A		

**Services Provided\***

<i>Service</i>	<i>Funded by</i>	<i>Frequency</i>	<i>Shared Service</i> <small><i>(list Partners)</i></small>	<i>Contracted</i>	<i>Statutory</i> <small><i>(Federal, State, Local)</i></small>
Refer to overview section					

Insert additional rows as needed. Click [here](#) for instructions or "google" - how to insert rows in a Microsoft word table

**1. Strategic Plan Goal #5 – Excellence in Government, calls for operational analysis/audit/alternative service delivery options, continuous improvement and a culture of innovation. To assist with accomplishing this goal, identify the top three services provided (by time or money spent) and 2018 efforts to improve service delivery (quality and/or resources allocated)**

**THE FOLLOWING PERTAINS TO WELLNESS EFFORTS ONLY WHICH WERE ASSUMED 1/1/17.**

- A. Health Risk Assessments – Need an electronic solution to alleviate mundane administrative tasks and assist in identifying participants, consolidating enrollment process for ease in scheduling appointments, tracking participation and streamlining the process of notifying Payroll of benefit changes for processing; integrate with third party applications and function as a comprehensive tool for delivery of information; provide electronic access for individuals to review benefits 24/7; provide a comprehensive portal of health and wellness tools to assist individuals in attaining personal goals; and provide a robust reporting mechanism. All are important when considering moving to an outcomes-based wellness program.
- B. Promotion of Programs (Financial Fitness Program, Aurora On-Site Nurse, Mayor's Challenge, etc.) – electronic solution would free up administrative staff time to 1) explore new programming ideas/opportunities/worksite challenges, possibly in partnership with other employers/community groups, 2) invest greater effort in becoming a Well City, 3) coordinate/implement ample educational opportunities to engage employees in their health and well being, and 4) focus on the deep dive of data to determine what is driving our costs and then strategize to implement measures that will address such.

**2. Describe any additional proposed changes to service delivery. (new initiatives should be documented on the new initiative form)**

See Attachment 1, New Initiative Form; this is dependent upon whether or not a viable electronic solution will become available. If not, efforts will continue to steer individuals to the City's Intranet/Internet for resources.

### **3. 2017 Accomplishments (include Strategic Plan and other approved plans accomplishments)**

See Wellness Initiatives (Attachment 2)

### **4. 2018 Priorities/Goals (include Strategic Plan and other approved plans goals)**

Develop a strategic 3 to 5 year plan for an outcomes-based wellness program and begin implementation. Determine best strategy to provide transparency of services, actively engage individuals in their health and well-being, address problematic health issues identified in aggregate data from HRA's, health claims, and EAP utilization, develop an annual calendar of programming and activities to address problematic areas with intent to change behaviors and subsequently decrease health care costs, promote age-related screenings, City's OTC program, smoking cessation, blood pressure screenings, flu shots, on-site nurse, EAP, financial fitness (City's 457 plan offerings), training and development, etc.

## Wellness Initiatives

- Committee branding/logo;
- Eliminated newsletter mailing to homes for savings of \$2000 annually;
- Provided HIPAA Lunch and Learn webinar;
- Support of Anthem's Onsite RN visits to City Hall and Public Works (promotion of BMI, Sleep Issues, Weight and Meal Planning)—additionally coordinated rollout to Police & Fire Depts. in July;
- Stall Tactics;
- Wellness Wednesday postings on AskAllis to recognize monthly health observances;
- Arranged EAP refresher presentation to Department/Division Heads;
- Helped to promote Mayor's Activity Challenge;
- Rolled out the Department of Employee Trust Funds' Financial Fitness Program;
- Created communication piece for Aurora's Enhancing Population Health program;
- Provided presentation on paid time off programs (PTO);
- Well City committee member;
- Health and Wellness Fair – ongoing coordination for September rollout to employees/spouses;
- HRA, EAP, and insurance claim utilization information captured for program evaluation;
- Provided education on outcomes-based wellness program; arranged for Aurora's Wellness Coordinator to deliver details of their wellness program;
- Coordinated HRA scheduling with internal departments and finalized schedule with Froedtert for Fall appointments;
- Became supporting member of Healthy Lifestyles Coalition meetings in order to relay information back to the EBAWC;
- Member of interview panel for hiring benefits consulting firm.



## 2018 NEW INITIATIVE BUDGET PROPOSAL

Proposed New Initiative	
Initiative Name	Promotion of Health and Benefit Literacy and Transparency
Initiative Leader Contact	Jane Barwick
Alternate Contacts	
Contacts E-Mail Addresses	jbarwick@westalliswi.gov
Phone/Extension	x8272

*Please submit New Initiative proposal with your budget documents to [rqrill@westalliswi.gov](mailto:rqrill@westalliswi.gov)*

Please complete the form below describing your proposed New Initiative	
1. Summary of Proposed Initiative (not to exceed 200 words); provide a synopsis of the proposed project.	<p>Promote health and benefit literacy and transparency with support from EBAWC; sell individuals on the true value of their employee benefits. This initiative would be used to educate employees on the many benefit offerings (Health, Dental, Pension, Life, EAP, 457 Def. Comp, HSA, FSA, etc.) and help identify that the City is a destination employer. The intent here is twofold: 1) provide a greater understanding of costs associated with employee benefits and the value they provide to employees as part of their total compensation package, 2) attempt to better engage employees in benefit selections, utilization, etc.</p>
2. New and Innovative (not to exceed 100 words); CWA is looking for new ways to deliver programs, products, or services. Describe what is new and innovative about this project.	<p>In a similar format like the pre-retirement seminar, present to employees a semi-annual review of benefit offerings, wellness program initiatives, etc. Use this approach to create awareness, engagement, and further promote benefits that may be underutilized (Telemedicine, OTC program, smoking cessation program, population health enhancement, on-site nurse, etc.).</p>
3. Strategic Importance (not to exceed 100 words); Why is this project of strategic importance?	<p>Typically employees are made aware of benefits at orientation and once per year during the annual open enrollment process. Because individuals experience life events at different stages in their career, they would benefit from a review periodically to help identify benefit offerings they haven't been fully taking advantage of. Additionally, it may help draw attention to certain offerings the City implemented as cost saving measures. Employees would gain a better understanding of their total compensation package and begin to understand the City's investment in their livelihood as well as becoming a destination employer.</p>
4. Identify others who are benefiting from the new initiative and how they would benefit.	<p>Employees/spouses/dependents.</p>
5. Outcomes and Metrics (not to exceed 200 words); What outcomes do you expect from this initiative? What are the metrics you will use to measure success?	<p>Increased participation in program offerings. Greater awareness of actions that need to be taken upon marriage, birth of child, etc. Appreciation of costs to offer employee benefits. Retention.</p>
6. Please indicate the estimated funding required and the anticipated duration (maximum of 3 years) of this Initiative.	<p>a. Estimate the revenue, expenses less the staffing and HR costs, and the initiative funding</p>

requested by year. Next, provide an estimate for staffing and the total cost for the initiative by year.

- b. When considering human resources, please estimate the “fully-loaded” cost. (“Fully-loaded” cost includes direct plus all indirect costs, including infrastructure/overhead).
- c. Explain the potential revenue sources by providing a list of potential users/customers. If the new initiative involves non-financial returns of some kind, explain those and identify the users/customers.

Duration of Initiative:  1 Year  2 Years  3 Years and ongoing

Budget: *To complete, double click on the spreadsheet to enter data.*

Budget Item	Year One	Year Two	Year Three	Initiative Totals
Anticipated Revenue	\$0	\$0	\$0	\$0
Anticipated Expenses (less staffing and HR)	\$0	\$0	\$0	\$0
<b>Initiative Net Requested (subtotal)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Anticipated Staffing and HR Costs	\$0	\$0	\$0	\$0
<b>Total Initiative Cost</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

Revenue Explanation: If the initiative is expected to generate revenue, justify the expected revenue and provide a list of potential users and customers. If the initiative involves non-financial returns of some kind, please explain this non-financial return and describe the users and customers.

This initiative involves indirect returns—no generation of revenue, but savings would be realized on the back end as employees engage in positive behaviors that may help to reduce costs, increase productivity, reduce sick time, personally enhance their financial future, etc. Transparency and education is key so individuals can gain a greater awareness and understanding of costs associated with benefits.

7. Sustainability of the Initiative: If the required funding exceeds 1-3 years, how will the City continue to fund the initiative?

Primarily staff time is involved and/or light refreshments if offered in evenings.

ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
Human Resources							
Regular Employees							
100-1301-517.11-01	Salary & Wages	260,684	258,552	317,678	317,346	317,346	332-
LEVEL	TEXT	TEXT AMT					
CCBG	HR DIRECTOR	100,256					
	HR GENERALIST	64,251					
	SAFETY/TRAINING COORD	73,050					
	HR SPECIALIST FT	53,539					
	HR SPECIALIST	26,250					
	SUBTOTAL 4.5 POSITIONS						
	BENEFITS/WELLNESS COORDINATOR-FUNDED IN HEALTH INS FUND						
	TOTAL HR POSITIONS: 5.5 FTE	317,346					
100-1301-517.11-02	Vacation	27,360	26,818	0	0	0	0
100-1301-517.11-03	Holidays	14,380	14,639	0	0	0	0
100-1301-517.11-04	Sick Leave	8,662	17,040	0	0	0	0
100-1301-517.11-07	Jury Duty	0	116	0	0	0	0
100-1301-517.11-12	Comp Time Used	1,945	3,024	0	0	0	0
* Regular Employees		313,031	320,189	317,678	317,346	317,346	332-
Overtime							
100-1301-517.13-01	Overtime Pay	2,738	1,627	2,450	1,700	1,700	750-
LEVEL	TEXT	TEXT AMT					
CCBG	DEPARTMENTAL OVERTIME	1,700					
		1,700					
* Overtime		2,738	1,627	2,450	1,700	1,700	750-
Misc Additional Pays							
100-1301-517.14-10	Car Allowance	1,568	1,481	1,750	1,750	1,750	0
LEVEL	TEXT	TEXT AMT					
CCBG	CAR ALLOWANCE - HR STAFF	1,750					
		1,750					
* Misc Additional Pays		1,568	1,481	1,750	1,750	1,750	0
Insurance							
100-1301-517.21-01	Health Insurance	74,828	54,011	67,620	65,851	65,851	1,769-
LEVEL	TEXT	TEXT AMT					
CCBG	HEALTH INSURANCE ESTIMATE	65,851					
		65,851					

ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
100-1301-517.21-04	Life Insurance	906	1,007	540	1,141	1,141	601
LEVEL	TEXT			TEXT AMT			
CCBG	LIFE INSURANCE ESTIMATE			1,141			
				1,141			
100-1301-517.21-07	Dental Insurance	3,830	4,118	4,320	4,099	4,099	221-
LEVEL	TEXT			TEXT AMT			
CCBG	DENTAL INSURANCE ESTIMATE			4,099			
				4,099			
* Insurance		79,564	59,136	72,480	71,091	71,091	1,389-
Payroll Taxes							
100-1301-517.22-01	Social Secrty-OASDI 6.2%	19,070	19,417	19,696	19,401	19,401	295-
LEVEL	TEXT			TEXT AMT			
CCBG	FICA - PENSION ESTIMATE			19,401			
				19,401			
100-1301-517.22-02	Social Security-HI 1.45%	4,460	4,541	4,606	4,538	4,538	68-
LEVEL	TEXT			TEXT AMT			
CCBG	FICA - MEDICARE ESTIMATE			4,538			
				4,538			
* Payroll Taxes		23,530	23,958	24,302	23,939	23,939	363-
Retirement							
100-1301-517.23-01	Retirement-General	21,450	21,569	21,602	21,262	21,262	340-
LEVEL	TEXT			TEXT AMT			
CCBG	WRS ESTIMATE			21,262			
				21,262			
* Retirement		21,450	21,569	21,602	21,262	21,262	340-
Retirement-Unfunded Liab							
100-1301-517.24-01	Retirement-General	5,368	5,548	0	0	0	0
* Retirement-Unfunded Liab		5,368	5,548	0	0	0	0
Professional Services							
100-1301-517.30-02	Consultants	0	0	2,000	2,000	2,000	0
LEVEL	TEXT			TEXT AMT			
CCBG	CARLSON-DETMANN: PROFESSIONAL ANALYSIS FEES ASSOCIATED WITH CLASSIFICATION SYSTEM (ANALYSIS OF			2,000			

ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
NEW AND/OR RECLASSIFIED POSITION REQUESTS); \$250/REQUEST, ESTIMATED 8 REQUESTS PER YEAR				2,000			
* Professional Services		0	0	2,000	2,000	2,000	0
Maintenance Contracts							
100-1301-517.32-04 Other		608	90	100	100	100	0
LEVEL	TEXT			TEXT	AMT		
CCBG	MAINTENANCE CONTRACTS				100		
					100		
* Maintenance Contracts		608	90	100	100	100	0
Utility Services							
100-1301-517.41-06 Telephone/Internet		118	249	150	1,100	1,100	950
LEVEL	TEXT			TEXT	AMT		
CCBG	3 SMART-PHONES/CELL PHONES				1,100		
					1,100		
* Utility Services		118	249	150	1,100	1,100	950
General Supplies							
100-1301-517.51-01 Postage		1,063	1,396	1,250	1,100	1,100	150-
LEVEL	TEXT			TEXT	AMT		
CCBG	HR CORRESPONDENCE				1,100		
					1,100		
100-1301-517.51-02 Office Supplies		1,005	2,099	1,500	1,500	1,500	0
LEVEL	TEXT			TEXT	AMT		
CCBG	OFFICE SUPPLIES AND FURNITURE				1,500		
					1,500		
100-1301-517.51-03 Photo Supplies		0	0	100	100	100	0
LEVEL	TEXT			TEXT	AMT		
CCBG	ID CARD PROGRAM				100		
					100		
100-1301-517.51-04 Food/Provisions		281	246	600	500	500	100-
LEVEL	TEXT			TEXT	AMT		
CCBG	MEETINGS & SEMINAR SUPPLIES/PROVISIONS/REFRESHMENT				500		
					500		



ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
100-1301-517.51-09	Other	842	1,901	1,815	1,665	1,665	150-
LEVEL	TEXT						
CCBG	FIRST AID/CPR/ETC SUPPLIES			1,640			
	WA LOGO ITEM FOR 1 YR TERM OF CSC CHAIRPERSON			25			
				1,665			
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*	General Supplies	3,191	5,642	5,265	4,865	4,865	400-
	Books & Periodicals						
100-1301-517.52-02	Other	0	42	0	0	0	0
100-1301-517.52-03	Subscriptions-Software	0	0	0	65,223	65,223	65,223
LEVEL	TEXT						
CCBG	ANNUAL SOFTWARE FEES (\$17223 NEOGOV PERFORM)			17,223			
	AND NEW SOFTWARE (\$48000 - MAESTRO BENEFIT ADMINSTRATION SYSTEM)			48,000			
				65,223			
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*	Books & Periodicals	0	42	0	65,223	65,223	65,223
	Advertising						
100-1301-517.54-02	Notices	8,418	18,792	7,000	20,000	20,000	13,000
LEVEL	TEXT						
CCBG	RECRUITMENT ADVERTISING - ELECTRONIC, PRINT, AND CAREER FAIRS			20,000			
				20,000			
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*	Advertising	8,418	18,792	7,000	20,000	20,000	13,000
	Printing						
100-1301-517.55-01	In-house (Print Shop)	944	0	0	0	0	0
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*	Printing	944	0	0	0	0	0
	Travel						
100-1301-517.56-01	Local Business Meetings	0	76	0	0	0	0
100-1301-517.56-02	Conferences & Seminars	2,183	1,551	2,200	2,200	2,200	0
LEVEL	TEXT						
CCBG	BUSINESS TRAVEL FOR HR STAFF-LOCAL/STATE/NATIONAL			2,200			
				2,200			
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*	Travel	2,183	1,627	2,200	2,200	2,200	0
	Education & Training						
100-1301-517.57-01	Membership Dues	1,431	1,448	1,850	2,000	2,000	150

ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
LEVEL	TEXT			TEXT	AMT		
CCBG	STATE AND NATIONAL MEMBERSHIP DUES (WI/NATIONAL SAFETY COUNCIL, ASSE, SHRM, IPMA, NPFLRA/WPELRA, MEA-SEW)			2,000			
				2,000			
100-1301-517.57-02	Registration Fees	1,907	1,982	3,000	3,150	3,150	150
LEVEL	TEXT			TEXT	AMT		
CCBG	REGISTRATION FEES FOR LOCAL/STATE/NAT'L ED/TRAINING			3,150			
				3,150			
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*	Education & Training	3,338	3,430	4,850	5,150	5,150	300
	Testing						
100-1301-517.59-01	Medical	116	116	650	650	650	0
LEVEL	TEXT			TEXT	AMT		
CCBG	TESTING/MEDICAL			650			
				650			
100-1301-517.59-02	Other	0	0	500	500	500	0
LEVEL	TEXT			TEXT	AMT		
CCBG	LAB TEST FOR SOIL/AIR/HAZ MAT'LS/POLICE RANGE/ETC			500			
				500			
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*	Testing	116	116	1,150	1,150	1,150	0
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**	Human Resources	466,165	463,496	462,977	538,876	538,876	75,899