

CITY OF APPLETON 2025 BUDGET

HUMAN RESOURCES

Human Resources Director: Jay M. Ratchman

Deputy Director of Human Resources: Kim M. Kamp

CITY OF APPLETON 2025 BUDGET HUMAN RESOURCES

MISSION STATEMENT

The Human Resource Department will attract, develop, and retain a high-performing, diverse workforce and foster an environment where employees can use their talents to thrive.

DISCUSSION OF SIGNIFICANT 2024 EVENTS

The Human Resources (HR) staff continued to support and provide service to City departments, staff, and the public through innovative programs and enhancements. Some examples of accomplishments in 2024 are:

General Administration:

- Continued use of the Baker Tilly safe system to keep our compensation plan competitive within the market.
- Implemented cost saving strategies for specialty prescription medications with Prudent RX.
- Implemented cost saving program through Proximal to provide employees choice in high quality, lower cost providers.
- Continued to train/develop staff members within HR, with specific focus on ERP and Neogov technologies.
- Continued working with the Financial Wellness Team, focusing on communication of the newly added Pimco Balanced Retirement Mutual Income Fund that is geared toward retirees and employees near retirement to generate retirement income.
- Continued relationships with UMR and CVS/Caremark, allowing us to continue to obtain significant rebates as part of this cooperative.
- Continued health services at the employee Connecting Care Clinic (CCC) and renewal of our commitment with the AASD. Successfully relocated the clinic, with a new location offering additional space, easier patient access, and significant cost savings.
- Continued transition into Tyler ERP for HR and Payroll systems.
- Updated a variety of HR and safety policies.
- Continued work by the HealthSmart Team, including sponsoring wellness programs and a wellness fair that is planned for October 2024. On-site biometric health screenings will take place in fall 2024.
- Provided monthly updates to dashboards to measure key metrics related to HR.
- Used employee surveys to gain feedback on our onboarding and new employee experience.
- Monitored usage of the Employee Assistance Program and surveyed employees for feedback on their experiences using this service.
- Started initial work on 457 deferred compensation plan review and compliance with Secure Act 2.0.

Employee and Labor Relations:

- Assisted with general leaves of absence, FMLA leaves of absence, and worker's compensation.
- Addressed wage compression issues and internal compensation equity issues.
- Assisted departments with a variety of employment related matters.
- Managed the unemployment compensation program (monitoring claims, responding to the State of Wisconsin, and contesting claims when appropriate).

Talent Acquisition and Retention:

- Completed recruitment processes for internal promotions, lateral transfers, and external recruitment.
- Coordinated and assisted the Police and Fire Commissions with the selection of police officers, firefighters, and other promotional processes.
- Completed hiring process for two Director positions.
- Continued efforts to increase our reach through social media, direct recruitment, and branding of recruitment materials.
- Conducted interviews in-person, virtually (Microsoft Teams and Zoom), and via the phone to accommodate candidate needs.
- Worked with the Parks and Recreation Department to increase efficiencies for seasonal recruitment.
- Continued on-going maintenance of Human Resources and DEI dashboards to display diversity, equity, and inclusion data for existing employees and recruitment processes.

Talent Management and Development:

- Coordinated required new-hire paperwork and training for seasonal staff via onboarding portal.
- Provided required training virtually for general employees and supervisors.
- Facilitated initial new employee online orientation training through the onboarding tool.
- Introduced the City Star Awards programs.
- Conducted bimonthly new supervisor orientation training and new employee orientations.
- Provided recognition for administrative professionals during Administrative Professionals' Week.
- Implemented recognition for multiple departments.
- Continued with City Celebrations Recognition program for employees with milestone anniversaries (10, 20, and 30 years).
- Administered the THRIVE Leadership Academy for current and upcoming City leaders.
- Facilitated EQi assessments and individual/team development.
- Facilitated EQi360 and Hogan assessments with the City leadership team members.

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MAJOR 2025 OBJECTIVES

To provide departmental support meeting the City's organizational needs in the areas of:

Human Resources Compliance and Administration:

- Ongoing monthly review of the medical and dental plans against trend and compliance changes.
- Quarterly strategic planning with insurance brokers on health, dental, and other benefit plans to review and, when appropriate, implement cost containment strategies.
- Evaluate and administer the annual personal health risk assessments and other health and wellness driven benefits for all employees, spouses, and retirees.
- Administer various wellness programs to educate employees and promote health and wellness.
- Ongoing review and maintenance of non-represented employee compensation system to ensure that it remains fair, equitable, and legally compliant.
- Promote the Connecting Care Clinic and services to maximize our return on investment.
- Promote programs to increase employee financial wellness and retirement readiness.
- Continue review of 457 deferred compensation plan and compliance with Secure Act 2.0.
- Enter into contract negotiations with Fire for a successor contract.
- Provide assistance on labor contract interpretations and handle grievances.
- Monitor unemployment reports and work with Attorney's Office on unique claims.

Talent Acquisition and Retention:

- Fill vacant employee positions throughout the year.
- Continue to use a variety of means to interview candidates (e.g. in-person, virtual, and phone).
- Continue to evaluate the use of testing and employment related assessments to best meet the organization's needs.
- Review background procedures and evaluate alternatives.
- Increase social media impact and continue to market HR on the appropriate social media platforms.
- Monitor and explore ways to improve our diversity outreach.
- Share and highlight DEI statistics with internal and external audiences.
- Enhance employment branding and utilize tools for targeted messaging.

Talent Management and Development:

- Continue to implement Citywide talent management strategy, including updates and implementation of Citywide and department workforce analyses, succession plans, individual development plans and leadership development programs.
- Continue to create and facilitate required general employee and supervisory training sessions.
- Continue development and implementation of e-learning programs.
- Conduct new employee orientation sessions.
- Facilitate new supervisor orientation sessions.
- Conduct seasonal employee training programs and online learning.
- Coordinate team and individual development opportunities for City employees.
- Manage and expand use of online onboarding and offboarding systems.
- Coordinate and facilitate organizational culture initiatives.
- Expand use of EQi, Hogan, and other leadership development tools.
- Research the development of a new aspiring leaders program to help prepare employees to move into supervisory roles.
- Continue to implement and manage performance evaluation and learning management system.

DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget			%
Unit	Title	2022	2023	Adopted 2024	Amended 2024	2025	Change *
Program Expenses							
14010	HR Compliance	404,386	409,050	416,431	421,381	426,111	2.32%
14020	Talent Acquisition	225,254	211,310	201,339	201,339	197,410	-1.95%
14040	Talent Management	195,658	189,612	194,080	194,080	199,719	2.91%
TOTAL		\$ 825,298	\$ 809,972	\$ 811,850	\$ 816,800	\$ 823,240	1.40%
Expenses Comprised Of:							
Personnel		671,054	709,979	697,905	697,905	711,986	2.02%
Training & Travel		23,521	18,273	26,350	26,350	26,350	0.00%
Supplies & Materials		10,895	11,794	15,781	15,781	15,552	-1.45%
Purchased Services		119,828	69,926	71,814	76,764	69,352	-3.43%
Full Time Equivalent Staff:							
Personnel allocated to programs		6.15	6.15	6.15	6.15	6.15	

* % change from prior year adopted budget
Human Resources.xls

CITY OF APPLETON 2025 BUDGET

HUMAN RESOURCES

Human Resources Compliance and Administration

Business Unit 14010

PROGRAM MISSION

For the benefit of managers and employees, so that the City may attract and retain talented and dedicated staff who will be fairly and equitably compensated and supervised, we will develop and administer policies and procedures, maintain compensation schedules reflective of the market, conduct labor contract negotiations, resolve grievances, and assist with employee-related issues.

PROGRAM NARRATIVE

Link to City Goals:

Implements Key Strategies #1: "Responsibly deliver excellent services", #3: "Recognize and grow everyone's talents", and #5: "Promote an environment that is respectful and inclusive".

Objectives:

- Develop, implement, maintain and distribute policies and procedures applicable to City employees.
- Review policies and procedures.
- Serve as a resource for other agencies seeking employment and statistical data.
- Administer various policies and programs to comply with state and Federal legislation.
- Administer employer fringe benefit programs and voluntary fringe benefit programs.
- Administer employee wellness programs.
- Ensure fringe benefit programs are administered in accordance with state and federal regulations.
- Counsel employees on benefit related matters.
- Conduct organizational benefit reviews.
- Coordinate and administer the employee compensation and classification system, including use of the Baker Tilly safe system, for ongoing evaluations.
- Administer the performance and goal evaluation system.
- Educate employees on health insurance costs and issues.
- Maintain employment records.
- Negotiate labor union contracts, address employee issues, and handle grievances as they occur.
- Investigate complaints and follow through to resolution.
- Provide intervention and conflict resolution services.
- Assist and advise employees on employment related issues.
- Provide contract interpretation and training.
- Coordinate and participate in grievance and interest arbitrations.

Major Changes in Revenue, Expenditures or Programs:

No major changes.

CITY OF APPLETON 2025 BUDGET

HUMAN RESOURCES

Human Resources Compliance and Administration

Business Unit 14010

PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2022	2023	Adopted 2024	Amended 2024	2025
Expenses					
610100 Regular Salaries	\$ 291,557	\$ 291,718	\$ 293,578	\$ 293,578	\$ 302,236
610500 Overtime Wages	2,479	2,313	-	-	-
615000 Fringes	99,758	106,415	106,064	106,064	110,086
620100 Training/Conferences	1,028	58	-	-	-
620200 Mileage Reimbursement	81	72	72	72	72
620600 Parking Permits	2,511	2,880	2,880	2,880	2,880
630100 Office Supplies	1,399	1,000	1,000	1,000	1,000
630300 Memberships & Licenses	-	578	420	420	420
630500 Awards & Recognition	-	92	92	92	92
630700 Food & Provisions	123	233	125	125	125
632001 City Copy Charges	2,630	2,555	3,000	3,000	3,000
632002 Outside Printing	200	393	400	400	400
632700 Miscellaneous Equipment	841	225	200	200	200
640400 Consulting Services	1,174	50	8,000	12,950	5,000
641307 Telephone	481	468	500	500	500
659900 Other Contracts/Obligation	124	-	100	100	100
Total Expense	<u>\$ 404,386</u>	<u>\$ 409,050</u>	<u>\$ 416,431</u>	<u>\$ 421,381</u>	<u>\$ 426,111</u>

DETAILED SUMMARY OF 2025 PROPOSED EXPENDITURES > \$15,000

None

CITY OF APPLETON 2025 BUDGET

HUMAN RESOURCES

Talent Acquisition and Retention

Business Unit 14020

PROGRAM MISSION

For the benefit of the program managers, so that the City will have a qualified, diverse staff, we will research, recruit and recommend appropriate candidates.

PROGRAM NARRATIVE

Link to City Goals:

Implements Key Strategies #1: "Responsibly deliver excellent services", #3: "Recognize and grow everyone's talents", and #5: "Promote an environment that is respectful and inclusive."

Objectives:

- Review and make recommendations on the filling of vacancies, reorganizations and other staffing changes.
- Review and update job descriptions and post or advertise vacant positions.
- Receive and screen applications.
- Administer selection process including: corresponding with applicants; maintaining recruitment data; testing; interviewing; performing background and reference checks; coordinating travel arrangements; medical, psychological, and physical agility testing; and documenting employment offers.
- Maintain statistical data on applicant files.
- Process all recruitment for seasonal employees.
- Outline and document all hiring processes and continue to explore online job posting opportunities.
- Evaluate the use of testing and employment related assessments and background procedures.
- Use Neogov system for all volunteer processes to streamline and ensure all background checks are completed.
- Build qualified applicant pools that are representative of the community.
- Continually evaluate creative methods to attract quality talent.
- Work through branding of recruitment materials.

Major Changes in Revenue, Expenditures or Programs:

No major changes.

**CITY OF APPLETON 2025 BUDGET
HUMAN RESOURCES**

Talent Acquisition and Retention

Business Unit 14020

PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2022	2023	Adopted 2024	Amended 2024	2025
Expenses					
610100 Regular Salaries	\$ 103,915	\$ 122,381	\$ 111,584	\$ 111,584	\$ 106,493
610500 Overtime Wages	-	31	-	-	-
615000 Fringes	42,646	53,764	52,464	52,464	53,088
620100 Training/Conferences	39	28	-	-	-
620200 Mileage Reimbursement	134	72	72	72	72
620500 Employee Recruitment	10,210	7,587	14,000	14,000	14,000
630300 Memberships & Licenses	319	198	205	205	205
630700 Food & Provisions	835	596	500	500	500
640400 Consulting Services	60,963	26,364	22,314	22,314	22,852
641200 Advertising	6,016	120	-	-	-
641307 Telephone	177	169	200	200	200
Total Expense	<u>\$ 225,254</u>	<u>\$ 211,310</u>	<u>\$ 201,339</u>	<u>\$ 201,339</u>	<u>\$ 197,410</u>

DETAILED SUMMARY OF 2025 PROPOSED EXPENDITURES > \$15,000

Consulting Services

Pre-employment Physical Testing	\$ 11,302
Pre-employment Psychological Testing	8,800
Personnel Evaluation, Inc.	2,750
	<u>\$ 22,852</u>

CITY OF APPLETON 2025 BUDGET

HUMAN RESOURCES

Talent Management and Development

Business Unit 14040

PROGRAM MISSION

For the benefit of City staff and the community, we will provide training to meet strategic goals and educational opportunities for staff to enhance employees' skills, to fulfill legally mandated training requirements, and to increase employee engagement and development.

PROGRAM NARRATIVE

Link to City Goals:

Implements Key Strategies #1: "Responsibly deliver excellent services", #3: "Recognize and grow everyone's talents", #5: "Promote an environment that is respectful and inclusive", and #6: "Create opportunities and learn from successes and failures".

Objectives:

- Coordinate and conduct annual required general employee training classes for all employees.
- Coordinate and facilitate supervisory training.
- Maintain Citywide training and tracking database.
- Create and manage e-learning courses.
- Facilitate staff and team development sessions.
- Deliver organizational development training.
- Conduct bimonthly new employee orientation programs.
- Conduct bimonthly new supervisor orientation training.
- Coordinate and conduct seasonal training through our online onboarding tool and in-person classes.
- Facilitate Citywide talent management strategy, including workforce analysis and succession plans.
- Implement recommendations of City Culture Team based on input received in the employee Stay Interviews and Group Engagement Conversations (e.g., career development planning and ongoing growth assignments).
- Coordinate and facilitate leadership programs, including individual development plans and mentoring program.
- Continue to implement and manage online Neogov performance evaluation system.
- Continue to expand use of online onboarding and offboarding systems.
- Coordinate and facilitate organizational culture discussions and action plans.
- Manage and expand use of leadership development tools (i.e. EQi, Hogan).
- Coordinate and implement 360 assessment tool for the leadership team members.
- Offer new THRIVE 2.0 classes for continued leadership development.
- Research and implement development programs for mid-level managers.
- Administer City engagement and recognition programs, including City Celebrations (to recognize tenured staff), City Stars (for outstanding performance), ongoing departmental and individual recognition, and the annual employee picnic.

Major Changes in Revenue, Expenditures or Programs:

No major changes.

CITY OF APPLETON 2025 BUDGET

HUMAN RESOURCES

Talent Management and Development

Business Unit 14040

PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2022	2023	Adopted 2024	Amended 2024	2025
Expenses					
610100 Regular Salaries	\$ 96,547	\$ 97,827	\$ 98,285	\$ 98,285	\$ 102,615
610500 Overtime Wages	-	199	-	-	-
615000 Fringes	34,152	35,331	35,930	35,930	37,468
620100 Training/Conferences	9,293	7,360	9,110	9,110	9,110
620200 Mileage Reimbursement	225	216	216	216	216
630300 Memberships & Licenses	-	-	289	289	60
630700 Food & Provisions	4,548	5,924	9,550	9,550	9,550
640400 Consulting Services	49,797	41,755	40,000	40,000	40,000
659900 Other Contracts/Obligation	1,096	1,000	700	700	700
Total Expense	<u>\$ 195,658</u>	<u>\$ 189,612</u>	<u>\$ 194,080</u>	<u>\$ 194,080</u>	<u>\$ 199,719</u>

DETAILED SUMMARY OF 2025 PROPOSED EXPENDITURES > \$15,000

Consulting Services

General Employee Training/Development	\$ 6,500
Organizational Development	10,000
Supervisor/Leadership Development	22,000
Administrative Professionals Event	1,500
	<u>\$ 40,000</u>

**CITY OF APPLETON 2025 BUDGET
HUMAN RESOURCES**

	2022 <u>ACTUAL</u>	2023 <u>ACTUAL</u>	2024 <u>YTD ACTUAL</u>	2024 <u>ORIG BUD</u>	2024 <u>REVISED BUD</u>	2025 <u>BUDGET</u>
Salaries						
610100 Regular Salaries	492,019	511,926	503,447	503,447	503,447	511,344
610500 Overtime Wages	2,479	2,543	-	-	-	37,468
615000 Fringes	<u>176,556</u>	<u>195,510</u>	<u>194,458</u>	<u>194,458</u>	<u>194,458</u>	<u>163,174</u>
TOTAL PERSONNEL	671,054	709,979	697,905	697,905	697,905	711,986
Training~Travel						
620100 Training/Conferences	10,360	7,446	9,110	9,110	9,110	9,110
620200 Mileage Reimbursement	440	360	360	360	360	360
620500 Employee Recruitment	10,210	7,587	14,000	14,000	14,000	14,000
620600 Parking Permits	<u>2,511</u>	<u>2,880</u>	<u>2,880</u>	<u>2,880</u>	<u>2,880</u>	<u>2,880</u>
TOTAL TRAINING / TRAVEL	23,521	18,273	26,350	26,350	26,350	26,350
Supplies						
630100 Office Supplies	1,399	1,000	1,000	1,000	1,000	1,000
630300 Memberships & Licenses	319	776	914	914	914	685
630500 Awards & Recognition	-	92	92	92	92	92
630700 Food & Provisions	5,506	6,753	10,175	10,175	10,175	10,175
632001 City Copy Charges	2,630	2,555	3,000	3,000	3,000	3,000
632002 Outside Printing	200	393	400	400	400	400
632700 Miscellaneous Equipment	<u>841</u>	<u>225</u>	<u>200</u>	<u>200</u>	<u>200</u>	<u>200</u>
TOTAL SUPPLIES	10,895	11,794	15,781	15,781	15,781	15,552
Purchased Services						
640400 Consulting Services	111,934	68,169	70,314	70,314	75,264	67,852
641200 Advertising	6,016	120	-	-	-	-
641307 Telephone	658	637	700	700	700	700
659900 Other Contracts/Obligation	<u>1,220</u>	<u>1,000</u>	<u>800</u>	<u>800</u>	<u>800</u>	<u>800</u>
TOTAL PURCHASED SVCS	119,828	69,926	71,814	71,814	76,764	69,352
TOTAL EXPENSE	<u>825,298</u>	<u>809,972</u>	<u>811,850</u>	<u>811,850</u>	<u>816,800</u>	<u>823,240</u>