

**CITY OF APPLETON 2024 BUDGET**

**HUMAN RESOURCES**

**Human Resources Director: Jay M. Ratchman**

**Deputy Director of Human Resources: Kim M. Kamp**

# CITY OF APPLETON 2024 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 2023 EVENTS

The Human Resources staff continued to support and provide service to City departments, staff, and the public through innovative programs and enhancements. Some examples of accomplishments in 2023 are:

### General Administration:

- Completed a compensation equity audit using guidance from the Equal Employment Opportunity Commission (EEOC), which was the final step in implementing our new compensation plan and documenting the plan as fair and equitable.
- Continued to train/develop staff members within HR, with specific focus on Tyler Munis and Neogov technologies.
- Continued working with the Financial Wellness Team, focusing on communication and the implementation of a fund geared toward retirees 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. Currently working on an option to relocate the clinic. The new location will offer additional space, easier patient access, and significant cost savings.
- Continued transition into Tyler Munis for HR and Payroll systems. Created an internal HR/Payroll team to allow for better communication and discussion of processes with new staff members in these critical roles.
- Updated a variety of HR and safety policies.
- Continued work by the HealthSmart Team including sponsoring wellness programs and fitness tracking challenges through myInertia. On-site biometric health screenings will take place in fall 2023.
- Provided monthly updates to online dashboards to measure key metrics related to HR.
- Completed a HIPAA audit with the use of an external compliance tool.
- Began conducting new employee surveys to gain feedback on our onboarding and new employee experience.
- Started 457 deferred compensation plan review and compliance with Secure Act 2.0.

### Employee and Labor Relations:

- Started labor contract negotiations with the Police and Valley Transit unions.
- Assisted with general leaves of absence, FMLA leaves of absence, worker's compensation, wage compression issues, internal compensation equity issues, career development, and a variety of employment related matters.
- Managed the unemployment compensation program (monitoring claims, responding to the State of Wisconsin, and contesting claims when appropriate).
- Updated City of Appleton EEOC and Affirmative Action plan documents.
- Participated in the Valley Transit tri-annual audit.

### Talent Acquisition and Retention:

- Completed recruitment processes for internal promotions, lateral transfers, and recruitment from the outside.
- Coordinated and assisted the Police and Fire Commissions with the selection of police officers, firefighters, and other promotional processes.
- Completed hiring process for the Community and Economic Development Director position.
- 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, Recreation, and Facilities Management Department to increase efficiencies for seasonal recruitment.
- 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.
- Conducted bimonthly new supervisor orientation training and new employee orientations.
- Provided recognition for administrative professionals during Administrative Professionals' Week.
- Implemented recognition for multiple departments, including DPW, Valley Transit, Finance and Mayor's Office.
- Implemented new 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.
- Provided Dealing with Difficult Customers De-escalation training for all employees.

# CITY OF APPLETON 2024 BUDGET

## HUMAN RESOURCES

### MAJOR 2024 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 including promotion of a new location.
- Promote programs to increase employee financial wellness and retirement readiness.
- Continue review of 457 deferred compensation plan and compliance with Secure Act 2.0.
- Finalize negotiation and implementation of the Police and Valley Transit contracts.
- 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.
- Continue work on branding.

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 Citywide 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 online onboarding, performance evaluation, and learning management system.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget			%
Unit	Title	2021	2022	Adopted 2023	Amended 2023	2024	Change *
<b>Program Revenues</b>		\$ 106	\$ -	\$ -	\$ -	\$ -	N/A
<b>Program Expenses</b>							
14010	HR Compliance	349,127	404,386	410,913	410,913	416,431	1.34%
14020	Talent Acquisition	149,269	225,254	180,388	180,388	201,339	11.61%
14040	Talent Management	178,312	195,658	181,823	181,823	194,080	6.74%
<b>TOTAL</b>		<b>\$ 676,708</b>	<b>\$ 825,298</b>	<b>\$ 773,124</b>	<b>\$ 773,124</b>	<b>\$ 811,850</b>	<b>5.01%</b>
<b>Expenses Comprised Of:</b>							
Personnel		589,760	671,054	667,855	667,855	697,905	4.50%
Training & Travel		17,126	23,521	25,990	25,990	26,350	1.39%
Supplies & Materials		7,708	10,895	15,779	15,779	15,781	0.01%
Purchased Services		62,114	119,828	63,500	63,500	71,814	13.09%
<b>Full Time Equivalent Staff:</b>							
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 2024 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
- Ensure fringe benefit programs are administered in accordance with State and federal laws
- 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:

Consulting services increased due to 457 deferred compensation plan review and compliance with Secure Act 2.0. Also, Training/Conferences budget moved out of Administration and into Talent Management and Development.

# CITY OF APPLETON 2024 BUDGET

## HUMAN RESOURCES

**Human Resources Compliance and Administration**

**Business Unit 14010**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2021	2022	Adopted 2023	Amended 2023	2024
<b>Revenues</b>					
480100 General Charges for Service	\$ 106	\$ -	\$ -	\$ -	\$ -
<b>Total Revenue</b>	<b>\$ 106</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Expenses</b>					
610100 Regular Salaries	\$ 252,282	\$ 291,557	\$ 298,957	\$ 298,957	\$ 293,578
610500 Overtime Wages	599	2,479	-	-	-
615000 Fringes	83,243	99,758	98,131	98,131	106,064
620100 Training/Conferences	76	1,028	110	110	-
620200 Mileage Reimbursement	9	81	-	-	72
620600 Parking Permits	2,152	2,511	2,880	2,880	2,880
630100 Office Supplies	819	1,399	1,000	1,000	1,000
630300 Memberships & Licenses	420	-	420	420	420
630500 Awards & Recognition	496	-	92	92	92
630700 Food & Provisions	361	123	123	123	125
631500 Books & Library Materials	92	-	-	-	-
632001 City Copy Charges	2,130	2,630	3,000	3,000	3,000
632002 Outside Printing	506	200	400	400	400
632700 Miscellaneous Equipment	21	841	200	200	200
640400 Consulting Services	5,391	1,174	5,000	5,000	8,000
641307 Telephone	468	481	500	500	500
659900 Other Contracts/Obligation	62	124	100	100	100
<b>Total Expense</b>	<b>\$ 349,127</b>	<b>\$ 404,386</b>	<b>\$ 410,913</b>	<b>\$ 410,913</b>	<b>\$ 416,431</b>

**DETAILED SUMMARY OF 2024 PROPOSED EXPENDITURES > \$15,000**

None

# CITY OF APPLETON 2024 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 2024 BUDGET  
HUMAN RESOURCES**

**Talent Acquisition and Retention**

**Business Unit 14020**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2021	2022	Adopted 2023	Amended 2023	2024
Expenses					
610100 Regular Salaries	\$ 77,038	\$ 103,915	\$ 107,364	\$ 107,364	\$ 111,584
610500 Overtime Wages	22	-	-	-	-
615000 Fringes	31,392	42,646	36,119	36,119	52,464
620100 Training/Conferences	74	39	-	-	-
620200 Mileage Reimbursement	6	134	-	-	72
620500 Employee Recruitment	13,621	10,210	14,000	14,000	14,000
630300 Memberships & Licenses	230	319	205	205	205
630700 Food & Provisions	947	835	500	500	500
640400 Consulting Services	18,764	60,963	22,000	22,000	22,314
641200 Advertising	7,003	6,016	-	-	-
641307 Telephone	172	177	200	200	200
Total Expense	<u>\$ 149,269</u>	<u>\$ 225,254</u>	<u>\$ 180,388</u>	<u>\$ 180,388</u>	<u>\$ 201,339</u>

**DETAILED SUMMARY OF 2024 PROPOSED EXPENDITURES > \$15,000**

Consulting Services

Pre-employment Physical Testing	\$ 10,764
Pre-employment Psychological Testing	8,800
Personnel Evaluation, Inc.	2,750
	<u>\$ 22,314</u>

# CITY OF APPLETON 2024 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
- Facilitate Citywide talent management strategy, including workforce analysis and succession plans
- 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 the City Celebrations Recognition program and the annual employee picnic.

#### Major Changes in Revenue, Expenditures or Programs:

Training/Conferences increased budget is a result of moving funds from Administration budget to Talent Management and Development.



**CITY OF APPLETON 2024 BUDGET**

**HUMAN RESOURCES**

**Talent Management and Development**

**Business Unit 14040**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2021	2022	Adopted 2023	Amended 2023	2024
Expenses					
610100 Regular Salaries	\$ 108,416	\$ 96,547	\$ 96,858	\$ 96,858	\$ 98,285
610500 Overtime Wages	196	-	-	-	-
615000 Fringes	36,567	34,152	30,426	30,426	35,930
620100 Training/Conferences	1,149	9,293	9,000	9,000	9,110
620200 Mileage Reimbursement	45	225	-	-	216
630300 Memberships & Licenses	-	-	289	289	289
630700 Food & Provisions	1,686	4,548	9,550	9,550	9,550
640400 Consulting Services	30,253	49,797	35,000	35,000	40,000
659900 Other Contracts/Obligation	-	1,096	700	700	700
Total Expense	<u>\$ 178,312</u>	<u>\$ 195,658</u>	<u>\$ 181,823</u>	<u>\$ 181,823</u>	<u>\$ 194,080</u>

**DETAILED SUMMARY OF 2024 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 2024 BUDGET HUMAN RESOURCES

	2021 ACTUAL	2022 ACTUAL	2023 YTD ACTUAL	2023 ORIG BUD	2023 REVISED BUD	2024 BUDGET
Charges for Services						
480100 General Charges for Service	106	-	-	-	-	-
TOTAL PROGRAM REVENUES	106	-	-	-	-	-
Salaries						
610100 Regular Salaries	437,739	492,019	156,363	503,179	503,179	503,447
610500 Overtime Wages	818	2,479	2,073	-	-	-
615000 Fringes	151,203	176,556	60,360	164,676	164,676	194,458
TOTAL PERSONNEL	589,760	671,054	218,796	667,855	667,855	697,905
Training~Travel						
620100 Training/Conferences	1,299	10,360	4,128	9,110	9,110	9,110
620200 Mileage Reimbursement	54	440	120	-	-	360
620500 Employee Recruitment	13,621	10,210	2,259	14,000	14,000	14,000
620600 Parking Permits	2,152	2,511	2,880	2,880	2,880	2,880
TOTAL TRAINING / TRAVEL	17,126	23,521	9,387	25,990	25,990	26,350
Supplies						
630100 Office Supplies	819	1,399	298	1,000	1,000	1,000
630300 Memberships & Licenses	650	319	721	914	914	914
630500 Awards & Recognition	496	-	-	92	92	92
630700 Food & Provisions	2,994	5,506	833	10,173	10,173	10,175
631500 Books & Library Materials	92	-	-	-	-	-
632001 City Copy Charges	2,130	2,630	670	3,000	3,000	3,000
632002 Outside Printing	506	200	-	400	400	400
632700 Miscellaneous Equipment	21	841	225	200	200	200
TOTAL SUPPLIES	7,708	10,895	2,747	15,779	15,779	15,781
Purchased Services						
640400 Consulting Services	54,408	111,934	25,345	62,000	62,000	70,314
641200 Advertising	7,003	6,016	-	-	-	-
641307 Telephone	641	658	158	700	700	700
659900 Other Contracts/Obligation	62	1,220	700	800	800	800
TOTAL PURCHASED SVCS	62,114	119,828	26,203	63,500	63,500	71,814
TOTAL EXPENSE	676,708	825,298	257,133	773,124	773,124	811,850