

GO COMMITTEE #1
April 11, 2019

Worksession

MEMORANDUM

April 10, 2019

TO: Government Operations and Fiscal Policy Committee
FROM: Linda Price, ^{LP}Legislative Analyst
SUBJECT: **Worksession – FY20 Operating Budget: Office of Human Resources**
PURPOSE: Vote on recommendations for the Council’s consideration

Those expected to attend this worksession include:

- Karen Plucinski, Acting Director, OHR
- Jenna Shovlin, Manager, Administrative Services Manager, OHR
- Corey Orlosky, Fiscal and Policy Analyst, Office of Management and Budget
- Kimberly Williams, Acting Manager, Business Operations and Performance, OHR

Budget Summary:

- The Executive’s FY20 Recommended Operating Budget for the Office of Human Resources is \$281,820,607, an increase of \$14,390,116 or 5.38 percent from the FY19 Approved Budget. The increase is largely due to an adjustment for claims expenditures, as well as same service adjustments.
- The General fund portion of the recommended budget increased by \$191,907 or 2.2% from FY19.
- The proposed claims expenditures adjustment will come before the Full Council on April 23 during the worksession on compensation and benefits.

Council Staff Recommendation:

- A discussion is needed to clarify the service impact of abolishing the Senior Lead Performance Management and Data Analyst position, which is currently vacant and tied to the labor negotiations support reduction.
- Receive an update from OHR on implementation of the changes in the hiring process.

Relevant pages from the FY20 Recommended Operating Budget are attached on ©1-8.

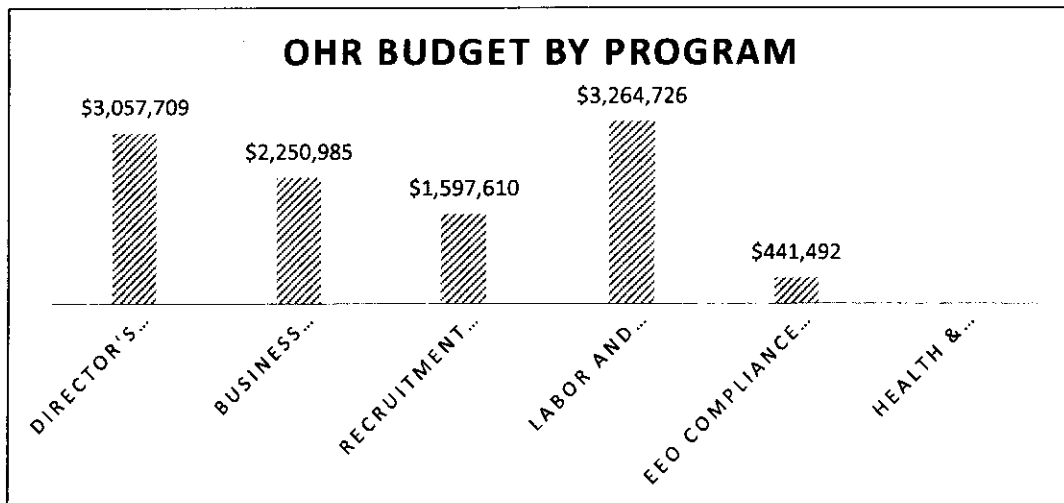
OVERVIEW

The mission of the Office of Human Resources (OHR) is to foster excellence in people by providing quality human resources services to employees, partners, and the community. An updated organizational chart for OHR is attached at © 9.

The FY20 Recommended Operating Budget for OHR is \$281,820,607, an increase of \$14,390,116 or 5.38 percent from the FY19 Approved Budget of \$267,430,491. The FY20 OHR Operating Budget is funded by the General Fund (3.2%) and the Employee Health Benefit Self Insurance Fund (96.8%). The following table shows the FY17 - FY20 funding levels for OHR.

	<i>FY17 Actual</i>	<i>FY18 Actual</i>	<i>FY19 Approved</i>	<i>FY 20 Recommended</i>	<i>% Change FY19 - FY20</i>
<i>Expenditures by fund</i>					
General Fund	\$8,217,358	\$8,189,113	\$8,755,692	\$8,947,599	2.19%
Self Insurance Fund	\$231,931,608	\$244,292,364	\$258,674,799	\$272,873,008	5.49%
Grant Fund	\$855	\$7,676	\$0	\$0	0.00%
<i>Expenditures by type</i>					
Personnel Cost	\$7,948,505	\$7,822,557	\$9,050,904	\$9,026,716	-0.27%
Operating Expenses	\$232,201,316	\$244,666,596	\$258,379,587	\$272,793,891	5.58%
<i>Total Expenditures</i>	\$240,149,821	\$252,489,153	\$267,430,491	\$281,820,607	5.38%
<i>Positions</i>					
Full-Time	66	68	69	68	-1.45%
Part-Time	4	3	3	2	-33.33%
<i>FTEs</i>	70	69.9	70.9	68.65	-3.17%

The following chart illustrates recommended FY20 funding by program for the Office of Human Resources budget.



*Health and Employee Welfare = \$271,208,085

FY20 EXPENDITURE ISSUES

The Executive is recommending several changes to the FY20 Recommended Operating Budget from the Approved FY19 Operating Budget. Many of the changes are reflected as multi-program adjustments with no service impacts. The various adjustments are displayed in the following chart. Additional changes will be reviewed within each respective program.

I. Multi-Program Adjustments

Item	Amount	FTEs
General Fund		
Annualization of FY19 Personnel Costs	\$74,759	0.0
FY20 Compensation Adjustment	\$173,377	0.0
Retirement Adjustment	\$13,814	0.0
Labor Negotiations Support	(\$176,473)	-1.0
Self-Insurance Fund		
FY20 Compensation Adjustment	\$88,665	0.0
Retirement Adjustment	\$7,943	0.0
Annualization of FY19 Personnel Costs	(\$89,183)	-1.0
Total	\$92,902	-2.0

II. Director's Office

The Director's Office provides executive management and recruitment, policy direction, strategic and financial planning, communications and public relations, and resources management services to the Department. The Office also provides consultation services on human resources matters to the County Executive and other department directors. Information Technology, Administrative Services and Communications and Strategic Planning are housed within the Director's Office.

The FY20 Recommended Budget for the Director's Office is \$3,057,709 and 21.4 FTEs. This represents an increase of \$370,200 or 13.77% over the FY19 Approved Budget. Multi-program adjustments total \$374,085 and 2.0 FTEs. Two positions have been shifted from other programs in OHR to the Directors Office. These positions include a Manager II shifted from Labor and Employee Relations and an Administrative Specialist III position, which was shifted from Employee Health and Welfare. Both positions are included in the total for multi-program adjustments. The other recommended change is a reduction of (\$3,885) for office supplies. **Council Staff concurs with the Executive's recommendation.**

On March 19, the Council enacted Expedited Bill 3-19 Administration - Executive Branch - Non-Merit Positions, at the request of the County Executive. The fiscal impact statement of this bill identified three occupied MI positions which were to be abolished in FY20 and would produce more than \$750,000 in savings. One MI position identified in the fiscal impact statement was in the Office of Human Resources. The Executive has recommended the occupied MI position be abolished in FY20. However, the occupied MI position is currently serving as the Acting Director of OHR while the Executive works to recruit a new Director. **The Committee may wish to receive more information from Executive staff**

on how the MI position could continue to serve in this role if a new HR Director has not been appointed by FY20.

III. Business Operations and Performance Division

The Business Operations and Performance Division includes the Classification and Compensation, Training and Organizational Development, and Workforce Performance Teams. The FY20 Recommended Budget for Business Operations and Performance is \$2,250,985 and 12.5 FTEs. This is a reduction of (\$366,480) or (14.0%), and a reduction of (2.25) FTEs. The Executive’s recommendation includes a multi-program adjustment which reduces the budget by (\$246,610), and also includes three additional reductions.

1. Multi-Program adjustment

Multi-program adjustments account for a reduction of (\$246,610) and (1.75) FTE. An MI position was shifted to Recruitment and Selection. The adjustment also abolishes a vacant Senior Lead Performance Management and Data Analyst position (Grade 30). It is Council staff’s understanding that the work performed by this position, related to labor costs and compensation, is being split between contract support and the Office of Management and Budget. **The Committee may wish to get additional details on the cost of contractor support, as well as the service impact of abolishing this position.**

2. Tuition Assistance Program

In order to meet target reductions, the Executive has recommended a reduction of (\$50,000) for the tuition assistance program in FY20. Tuition assistance funds are available to employees with merit system status on a first come, first served basis until all funding for the fiscal year has been obligated. Once the funds are depleted for the fiscal year, tuition assistance is not available until the next year.¹

The Executive has recommended that tuition assistance be reduced by (\$25,000) for MCGEO employees and (\$25,000) for IAFF, Volunteers, and Non-Represented. There would be no reduction in funding for FOP due to collective bargaining agreements that are in place. If approved, OHR estimates that around 26 eligible employees would be unable to receive tuition assistance. There is still approximately \$118,000 remaining to provide tuition assistance to employees in FY19. **Council staff concurs with the Executive’s recommendation.**

Group	FY18 & FY19 App.	FY18 Paid Out	FY19 Paid Out*	FY20 Rec.	FY19 – FY20 Change
FOP	\$135,000	\$70,379	\$50,462	\$135,000	\$0
MCGEO	\$150,000	\$134,713	\$141,006	\$125,000	(\$25,000)
IAFF, Volunteers, Non-Represented	\$150,000	\$138,464	\$125,737	\$125,000	(\$25,000)
Total	\$435,000	\$343,556	\$317,205	\$385,000	(\$50,000)

**As of April 9, 2019*

¹ A full overview of the Tuition Assistance program is available at https://www.montgomerycountymd.gov/HR/Resources/Files/Training/FY19_Tuition_Assistance_Program_Presentation.pdf.

3. Senior Fellows Program

In order to meet target reductions, the Executive has recommended a reduction of (\$50,000) and half an FTE to partially suspend the Senior Fellows Program. Half of an FTE and \$50,000 would be left in FY20 to continue this program. **Council staff concurs with the Executive's recommendation.**

4. Management Training Programs

The recommended budget would reduce administrative support costs for the Management Training Programs by (\$19,870). According to the Executive Branch, Training and Organizational Development had already begun to seek alternative ways to provide administrative support for training programs. **Council Staff concurs with the Executive's recommendation.**

5. Program updates

Executive Branch staff have budgeted \$105,000 for Occupational Classification studies in FY19 and \$25,000 for represented individual classification studies, which is unchanged from FY19. Studies for unrepresented employees are paid for by the department requesting the study.

The following enhancements are planned in FY20 for the Training and Organizational Development program. A full list of FY19 accomplishments are on © 30 – 31.

- Develop a long-term Organizational Leadership Development Strategy for Management Leadership Services (MLS) to include formalized learning, mentoring programs, new manager resources.
- Fully implement the mandatory training notification process for Preventing Workplace Harassment Training. In FY19, Training and Organizational Development Team reports the following accomplishments.

IV. Recruitment and Selection

The Recruitment and Selection team is responsible for attracting, hiring, promoting and retaining candidates for County departments and agencies that result in a highly-skilled, competent, and diverse workforce. The FY20 Recommended Budget for Recruitment and Selection is \$1,597,610 and 10.4 FTEs. This represents an increase of \$80,933 or 5.3%. The Executive's recommendation includes a multi-program adjustment which increases the budget by \$349,136 and 1.0 FTEs, and also includes two reductions, which would abolish the MI position and 1.0 FTE.

1. MI Position

As discussed earlier, the recommended budget abolishes the MI position which was identified as savings in the fiscal impact statement for Expedited Bill 3-19 Administration - Executive Branch - Non-Merit Positions. The MI position had been in Business Operations and Performance but has been shifted to Recruitment and Selection. The shift is reflected in the multi-program adjustment. As shown below, part of the MI position is funded in the General Fund, while the remainder is funded from the Employee Health Self Insurance Fund.

- General Fund reduction: (\$107,281) / (0.4 FTEs)
- Self Insurance Fund reduction: (\$160,922) / (0.6 FTEs)

2. Program updates

In FY18, the average time to fill a vacant position was 91 days, an increase from the FY17 average of 83 days. The FY20 target is 89 days. This increase can be attributed to challenges encountered during the implementation of the ProForm© candidate assessment system. OHR has created a service level agreement with departmental hiring managers to provide the eligible list of candidates within seven to ten business days. ProForm© was developed under former County Executive Leggett and the Chief Innovation Officer's, Talent Acquisition and Development (TAD) Initiative.

The candidate assessment system works to reduce the time to fill vacancies by eliminating the manual determination of minimum qualifications and the rater reviewer evaluation process. ProForm© was piloted in June 2017 with Health and Human Services, the Department of Permitting Services, and the Department of Technology Services. With the exception of Public Safety specific positions, the system was fully implemented in the fall of 2017.

ProForm© has allowed OHR to make a number of improvements to the hiring process. They are able to quickly produce an eligible list, preferred criteria are developed to screen candidates, and hiring departments no longer have to go through the rater review process. However, some of the ongoing issues with the candidate assessment system include the amount of work required upfront to develop the minimum qualifications and preferred criteria and the quality of candidates included on the eligible list. Additional data and feedback following the pilot and lessons learned are © 12 – 24.

OHR is continuing to work with stakeholders to refine and improve the system. The following update was provided by Executive staff.

OHR implemented the candidate assessment application (ProForm©) in 2017 to address longstanding issues with the time to hire and ensure internal applicants have access to job opportunities that consider relevant experience. The assessment tool automated a highly manual and inconsistent rater review process that was fulfilled by the Recruitment Specialists to identify candidates that met the minimum qualifications followed by the department hiring managers that had to then review all resumes submitted to them by Recruitment to identify well qualified candidates to select for interviews. The entire process generally took several months and was inefficient and burdensome to OHR and the departments.

With the implementation of ProForm©, each applicant must complete an automated candidate assessment when applying for a County position. While the implementation of the new system has not been without its challenges, the timeline to provide departments with a well-qualified list occurs within 7-10 days after the close of the job posting.

OHR quickly recognized that the change cut down the delivery time of the well qualified list, but a body of work was created at front end of the process that required greater input and collaboration with departments to design the candidate assessment. Recruitment

Specialists work directly with department hiring managers to develop assessments and have taken on a greater role as a consultative partner to match up position descriptions/job classifications with the assessments. Regular meetings are conducted with larger departments and/or those departments with high numbers of hiring throughout the year to create a timeline and structure to the end to end hiring process. The candidate assessment is just one aspect of the larger end to end process and the primary change to the way we do business has been the shift from the transactional nature of the Recruitment Specialist's work to the more collaborative approach currently in place.

V. Labor and Employee Relations

The Labor and Employee Relations Program provides support to County managers in the areas of advice and training on labor issues, advice on related personnel policies and procedures, and the negotiation of collective bargaining agreements including competitive compensation and benefits. It also provides multi-disciplinary occupational medical services, such as work-related medical and safety hazard assessments to promote the health, wellness, and productivity of the County workforce.

The FY20 Recommended Budget is \$3,264,726 and 7 FTEs. The Executive's recommendation includes a multi-program adjustment which reduces the budget by (\$118,137) and (1.0 FTE), this is partially due to the shift of the Labor and Employee Relations Manager II to the Director's Office. Additionally, an increase of \$223,225 is included to enhance contractor support for Occupational Medical Services. The contract was executed in January 2017 with Inova Health Care Services. The increase does not change services provided, but provides additional funds to more accurately reflect the cost of the services provided and also includes \$14,921 for a CPI adjustment. **Council staff concurs with the Executive's recommendation.**

VI. EEO Compliance and Diversity Management

The Equal Employment Opportunity (EEO) and Diversity Management team ensures compliance with local, state, and federal discrimination laws. Additionally, they provide assistance, guidance, and training to employees and managers concerning equal employment and diversity management to promote a discrimination free workplace that values diversity. The FY20 Recommended Budget is \$441,492 and includes 3.0 FTEs. The only change is from multi-program adjustments, which provide an increase of \$12,599. **Council Staff concurs with the Executive's recommendation.**

VII. Health and Employee Welfare

The Health Insurance Team manages and administers the County's health and welfare plans in accordance with County policy and local, state and federal laws. Activities include managing annual open enrollment and program eligibility, providing customer service, education and counseling to employees, participating agency employees, retirees and their dependents. The FY20 Recommended Budget is \$271,208,085. The program is funded entirely from the Employee Health Self-Insurance Fund. The Executive's recommendation includes a multi-program adjustment which reduces the budget by (\$278,171) and (2.0 FTEs). Included in this adjustment is the shift of the Administrative Specialist position to the Director's Office and the M1 position being abolished.

The Recommended Budget also includes increases costs to adjust the administrative operating expenses in the fund by \$129,640. The Police Stress Management program has also been shifted from Health and Human Services. **Council Staff concurs with the Executive’s recommendations.**

Finally, the Executive has recommended an increase of \$14,222,066 to reflect an adjustment for claims expenditures. **This item will come before the Full Council for review during the worksession on compensation and benefits, which is scheduled for April 23, 2019.**

1. Program Updates

Executive Branch staff provided the following update regarding Tier II service requests in 2018. *The Health Insurance Team continues to partner with MC311 to improve the experience for our customers. An annual review of the Knowledge Based Articles (KBA's) was performed to ensure that MC311 call takers have accurate information when answering questions. This included updating key words for searches and revising answers to ensure relevance. There are approximately 140 KBA's that the team maintains. The Health Insurance Team and MC311 meet several times throughout the year to review the process and identify areas that need improvement. The Health Insurance Team conducts trainings to MC311 call takers prior to the annual open enrollment period to educate them on changes in employee benefits. In addition, any correspondence that is sent to employees or retirees is provided to MC311 in advance, so they can be prepared to handle incoming calls.*

The “Verify Health Coverage” for the active employees and retirees continues to be the categories that have the largest number of service requests with a 45% jump in 2018. The County executed new contracts for dental, vision, and life insurance which contributed to the spike in calls.

There was a total of 11,228 MC311 OHR service requests from January 1, 2018 through December 31, 2018. Of the calls, 7,756 were for general information and 3,472 were at the fulfillment level. The Tier II specialists began answering MC311 requests through a separate phone number dedicated specifically for call takers that are either an employee, retiree, participating agency employee or potential employee in September 2016. The following update was provided on the use of MC311 Tier II system for employee HR calls from January 1, 2018 through December 31, 2018.

Knowledge Based Article	2017 Service Requests	2018 Service Requests
Retiree - Verify Health Insurance Coverage	378	547
Participating Agency Employee - Verify Health Insurance Coverage	21	10
Employee - Health Insurance Carrier Requires Current Information	51	39
Employee Verify Health Insurance Coverage	599	624
Retiree - Group Insurance Cost Share	154	129
Total, Tier II	1,203	1,008

This packet contains:

FY20 CE Recommended OHR Operating Budget	1
Organization Chart	9
CountyStat, Headline Performance-Measure Hiring Time	10
Implementation of Candidate Assessment System Feedback	12
Council Staff Operating Budget Questions & Responses	25

F:\PRICE\OHR\FY19\Operating Budget\FY20 Op Bud - OHR, April 11.docx



Human Resources

RECOMMENDED FY20 BUDGET

\$281,820,607

FULL TIME EQUIVALENTS

68.65

☀ **KAREN PLUCINSKI, ACTING DIRECTOR**

MISSION STATEMENT

To foster excellence in people by providing quality human resources services to our employees, partners, and the community.

BUDGET OVERVIEW

The total recommended FY20 Operating Budget for the Office of Human Resources is \$281,820,607, an increase of \$14,390,116 or 5.38 percent from the FY19 Approved Budget of \$267,430,491. Personnel Costs comprise 3.20 percent of the budget for 68 full-time position(s) and two part-time position(s), and a total of 68.65 FTEs. Total FTEs may include seasonal or temporary positions and may also reflect workforce charged to or from other departments or funds. Operating Expenses account for the remaining 96.80 percent of the FY20 budget.

The Office of Human Resources Budget is comprised of a General Fund component of \$8,947,599 and a Employee Health Benefit Self Insurance Fund component of \$272,873,008.

COUNTY PRIORITY OUTCOMES

While this program area supports all seven of the County Executive's Priority Outcomes, the following is emphasized:

◆ **Effective, Sustainable Government**

DEPARTMENT PERFORMANCE MEASURES

Performance measures for this department are included below (where applicable), with multi-program measures displayed at the front of this section and program-specific measures shown with the relevant program. The FY19 estimates reflect funding based on the FY19 Approved Budget. The FY20 and FY21 figures are performance targets based on the FY20 Recommended Budget and funding for comparable service levels in FY21.

Measure	Actual FY17	Actual FY18	Estimated FY19	Target FY20	Target FY21
Multi-Program Measures					
Average customer satisfaction rating (1-4) on the yearly internal customer survey of County managers	3.09	3.07	3.10	3.30	3.50

INITIATIVES

- ☀ Creating an automated training notification for Managers and HR Liaisons to monitor employees compliance with mandatory trainings.
- ☀ Developing on-line, computer-based learning strategies to complement existing instructor lead training. Piloting Preventing Workplace Harassment training in Spring 2019.

①

- ★ Initiated the formal bid process to procure contracts for a new pharmacy benefits manager, Flexible Spending Account and Direct Bill/COBRA Administrator with the goal to obtain products and services at prices that are competitive for each service area.
- ★ Create a cross-functional project team to develop and execute a comprehensive background investigation policy and procedures.
- ★ Research innovative ways of on-boarding and expediting college and high school students interested in internship opportunities within County government.
- ★ Increase focus and awareness on mental health issues and design program offerings for various County agencies based on their needs.
- ★ Expand wellness program offerings for high-risk employee populations to address key topics including managing stress, weight loss strategies, and diabetes prevention and measures to combat the disease.
- ★ Offer programs that encompass all dimensions of wellbeing including emotional, financial, intellectual, occupational, physical, social, and spiritual.
- ★ Initiate project to move toward a paperless Benefits Open Enrollment process to allow employees greater flexibility when considering changes to or signing up for new benefits during annual Open Enrollment.

ACCOMPLISHMENTS

- ✓ Received the Alliance for Workplace Excellence Awards including the Workplace Seal of Approval, Health and Wellness Seal of Approval, Diversity Champion Award, Ecoleadership Award, Best Practices Supporting Workers' of All Abilities Award, and Best Practices Supporting 50+ Award.
- ✓ Implemented group insurance contracts with new dental, life, vision, and long-term disability vendors, which resulted in savings to the County and additional value added benefits not previously offered, including hearing aid discounts and legal services.
- ✓ Provided employability skills training and workplace internships for 57 participants through the Project SEARCH program since September 2012, with an employment rate for Montgomery County and partners of 60 percent (26 positions).
- ✓ Enhanced the Lieutenant's promotional exam process for the Department of Correction and Rehabilitation to increase the pool of well-qualified candidates.
- ✓ Enhanced marketing materials used at Career Fairs and proactively outreached to universities and professional associations to strengthen and attract a diverse and well-qualified pool of candidates for Montgomery County positions.
- ✓ Trained over 200 MLS managers on effectively using Conflict Facilitation techniques as part of the County's informal dispute resolution processes.
- ✓ Expanded Wellness webinar library to allow shift workers to participate in on-line webinars at a time that is convenient for their schedules.
- ✓ Increased Virgin Pulse platform enrollment from 54.6 percent to 60 percent and engagement remains steady at about 50 percent, placing the County above all of the Contractor's average book of business in both categories.
- ✓ Created and implemented the Police Leadership Service Compensation Plan through Executive Regulation, which amended the Code of Maryland Regulations to create a new Police Leadership (PLS) salary schedule to include sworn police managers' schedule and aligned salary increases with performance.
- ✓ Developed a comprehensive leadership development strategy to support key business priorities and enable County leadership and management to perform at their fullest potential in delivering quality services to our residents in a time of rising demands for service and constrained resources. In the past six months, over 1,000 managers participated in the MLS LEADS program offerings.

INNOVATIONS AND PRODUCTIVITY IMPROVEMENTS

- ★ Implemented an automated process for granting Merit Status to probationary employees that removed the requirement for HR Liaisons to process individual memos for each employee at the time they are granted Merit status.

- ☀ Implemented the Temporary and Probationary Promotional Oracle fields and dashboards to ensure HR Liaisons have the necessary tools to track and manage all promoted employees.
- ☀ Created a service level agreement with departmental hiring managers to provide the eligible list of candidates within seven to ten business days.
- ☀ Trained over 75 percent of the HR Liaison community on the Wage Equity Guidelines to improve productivity and timeline for approvals.

PROGRAM CONTACTS

Contact Jennifer Shovlin of the Office of Human Resources at 240.777.5039 or Corey Orlosky of the Office of Management and Budget at 240.777.2762 for more information regarding this department's operating budget.

PROGRAM DESCRIPTIONS

☀ Director's Office

The Director's Office provides services to the Department: executive management and recruitment; policy direction; strategic and financial planning; communications and public relations; and resources management. In addition, the Office provides consultation services on human resources matters to the County Executive and other department directors. The Director's Office is responsible for human resources policy development and planning, the administration of human resources programs, ensuring the integrity of the merit system, and directing the design and implementation of new initiatives to better serve customers and improve organizational performance. The Director's Office is also responsible for the departmental human capital strategy, which focuses on improving automation, customer service, cultural change, and communication as recommended by key partners and stakeholders.

The Director's Office is comprised of the following.

- Information Technology - provides management and oversight of the Department's information technology initiatives.
- Administrative Services - provides management and oversight of the Office's procurement of goods and services, budget preparation, administration, and financial management of the employee health benefits fund, and management over the Records Management Section. The team also remits payments to benefit program carriers and third party administrators, approves invoices, and remits bills to employees and retirees as necessary.
- Communications and Strategic Planning - provides management and coordination of communications strategies, website content management, and the Department's strategic initiatives.

FY20 Recommended Changes	Expenditures	FTEs
FY19 Approved	2,687,509	19.40
Decrease Cost: Office Supplies	(3,885)	0.00
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs.	374,085	2.00
FY20 Recommended	3,057,709	21.40

☀ Business Operations and Performance

The Business Operations and Performance Division is comprised of the Classification, Compensation, Training and Organizational Development, and Workforce Performance teams. The Classification and Compensation team reviews and evaluates the duties and responsibilities of individual positions and occupational classes in response to employee, department, and union requests to assure that positions are correctly assigned at comparable grade levels. This team also ensures that employees are accurately and appropriately compensated through technical analysis and equitable application of compensation systems and procedures. The team designs compensation plans and provides leadership to departments on performance-based pay. The Classification and Compensation team is also responsible for oversight and administration of the County's compensation policies.

Workforce Performance consists of the Rewarding Excellence and Performance Management team. Rewarding Excellence is a process that encourages, mentors, and coaches front-line employees to work together as a team to implement improvement initiatives within Montgomery County Government. Performance management is a continuous process, which includes creating performance appraisals, observing and documenting performance and behavior, providing feedback, coaching, mentoring, and evaluating employees. The goal is to help employees and supervisors achieve Montgomery County's overall vision of efficient, effective, innovative, and responsive delivery of quality services.

The Training and Organizational Development team provides training, workforce planning, and organizational effectiveness programs and activities that increase the knowledge, skills, and abilities of the County's workforce. The team offers professional development opportunities to employees and managers through online learning and instructor-led classes and designs performance improvement strategies and specialized training to meet specific departmental needs. The team also designs short- and long-term business strategies to create required professional competencies, enhance organizational performance and effectiveness, and champions organizational change efforts to support the County's objectives.

Program Performance Measures	Actual FY17	Actual FY18	Estimated FY19	Target FY20	Target FY21
Customer satisfaction with training: Percentage who found training helpful to job	93.1	92.0	93.0	93.0	93.0

FY20 Recommended Changes	Expenditures	FTEs
FY19 Approved	2,617,465	14.75
Decrease Cost: Management Training Programs	(19,870)	0.00
Decrease Cost: Partial Suspension of Senior Fellows Program	(50,000)	(0.50)
Decrease Cost: Tuition Assistance	(50,000)	0.00
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs.	(246,610)	(1.75)
FY20 Recommended	2,250,985	12.50

☀ Recruitment and Selection

The Recruitment and Selection team is responsible for attracting, hiring, promoting, and retaining candidates for County departments and agencies that result in a highly skilled, competent, and diverse workforce. The team engages in a wide variety of outreach activities designed to ensure quality and diversity in the candidate population including recruitment planning, guidance, and advisory services to departments and agencies on selection and hiring. In addition, the team conducts new employee orientation; administers reductions-in-force; designs and administers public safety promotional examinations and other employment tests; administers the County's internship, fellowship, and volunteer programs; manages the County's Disability Employment Initiatives; and provides selection guidelines training on interviewing and selecting employees.

Program Performance Measures	Actual FY17	Actual FY18	Estimated FY19	Target FY20	Target FY21
Average satisfaction score (1-5) of departments with pools of candidates for positions, based on a survey of hiring managers	4.5	4.5	4.6	4.6	4.7
Average number of days to fill a vacant County position	83	91	90	89	85

FY20 Recommended Changes	Expenditures	FTEs
FY19 Approved	1,516,677	10.40
Eliminate: Abolish M1 Position (General Fund)	(107,281)	(0.40)
Eliminate: Abolish M1 Position (Employee Health Self Insurance Fund)	(160,922)	(0.60)
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs.	349,136	1.00
FY20 Recommended	1,597,610	10.40

☀ Labor and Employee Relations

Labor and Employee Relations consists of two teams: Labor and Employee Relations and Occupational Medical Services. The Labor and Employee Relations team is designed to support County managers in the areas of advice and training on labor issues, advice on related

4

personnel policies and procedures, and the negotiation of collective bargaining agreements including competitive compensation and benefits. The Labor and Employee Relations team helps lead the collective bargaining process and provides early intervention strategies for workplace disputes to ensure that managers comply with contractual and legal requirements and improve employee labor relations.

The Occupational Medical Services team (OMS) (including Fire and Rescue Occupational Medical Services) provides multi-disciplinary occupational medical services, such as work-related medical and safety-hazard assessments to promote the health, wellness, and productivity of the County workforce. OMS also administers the County's drug and alcohol and centralized Family and Medical Leave programs. The Labor and Employee Relations team also includes the County's Disability Program Manager who administers the County's Americans with Disabilities Act (ADA) program.

Program Performance Measures	Actual FY17	Actual FY18	Estimated FY19	Target FY20	Target FY21
Percentage of grievances resolved before reaching third party neutral	93	98	98	98	98

FY20 Recommended Changes	Expenditures	FTEs
FY19 Approved	3,159,638	8.00
Enhance: OMS Contractor Support	223,225	0.00
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs.	(118,137)	(1.00)
FY20 Recommended	3,264,726	7.00

☀ **EEO Compliance and Diversity Management**

The Equal Employment Opportunity (EEO) and Diversity Management team ensures compliance with local, State, and Federal discrimination laws, as well as MCPR Section, 5 related to Equal Employment Opportunity. The Division provides mandatory and customized training to employees and managers concerning equal employment and diversity management. The training also extends to civilian and public safety employees. The Division is responsible for mandated Federal and State EEO-related reporting requirements, EEO certifications, data/statistical analyses, and other EEO related reporting compliance associated with grant funding. The Division's primary responsibility is EEO compliance as it relates to the investigation of EEO complaints, monitoring departmental investigations, providing guidance and assistance to managers/supervisors related to EEO matters and resolution of EEO issues/complaints including mediation and reaching amicable resolution of EEO complaints.

FY20 Recommended Changes	Expenditures	FTEs
FY19 Approved	428,893	3.00
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs.	12,599	0.00
FY20 Recommended	441,492	3.00

☀ **Health & Employee Welfare**

The Health Insurance team manages and administers the County's health and welfare plans in accordance with County policy and local, State, and Federal laws. In addition to maintaining operations associated with annual open enrollment and program eligibility, the team provides customer service, communications, education, and counseling to County employees, participating County agency employees, retirees, and their dependents (over 45,000 total people) in a manner that ensures an understanding of program provisions and their value as part of total compensation.

The Wellness Program uses a dynamic, comprehensive, and data-driven strategy to promote employee engagement in health and well-being. The Wellness Program provides employee wellness activities such as health screenings, educational seminars, wellness and fitness classes, and incentive programs, and utilizes communication channels such as web, social media, and a monthly newsletter.

The Stress Management team promotes the emotional, mental, and physical well-being of Montgomery County Police Department employees and their family members through counseling, training, consultation services, and peer support.

FY20 Recommended Changes	Expenditures	FTEs
FY19 Approved	257,020,309	15.35

FY20 Recommended Changes	Expenditures	FTEs
Increase Cost: Claims Expenditure Adjustment	14,222,066	0.00
Increase Cost: Adjustment to Administrative Operating Expenses	129,640	0.00
Shift: Position Transfer - from HHS to Police Stress Management	114,241	1.00
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs.	(278,171)	(2.00)
FY20 Recommended	271,208,085	14.35

BUDGET SUMMARY

	Actual FY18	Budget FY19	Estimate FY19	Recommended FY20	%Chg Bud/Rec
COUNTY GENERAL FUND					
EXPENDITURES					
Salaries and Wages	4,280,772	4,633,971	4,445,545	4,708,646	1.6 %
Employee Benefits	1,121,508	1,288,279	1,093,112	1,342,913	4.2 %
County General Fund Personnel Costs	5,402,280	5,922,250	5,538,657	6,051,559	2.2 %
Operating Expenses	2,786,833	2,833,442	2,994,917	2,896,040	2.2 %
County General Fund Expenditures	8,189,113	8,755,692	8,533,574	8,947,599	2.2 %
PERSONNEL					
Full-Time	68	69	69	68	-1.5 %
Part-Time	3	3	3	2	-33.3 %
FTEs	44.65	45.65	45.65	45.00	-1.4 %
County General Fund Revenues	0	0	0	0	—

EMPLOYEE HEALTH SELF INSURANCE

EXPENDITURES					
Salaries and Wages	1,924,142	2,490,300	2,146,064	2,284,977	-8.2 %
Employee Benefits	496,135	638,354	507,768	690,180	8.1 %
Employee Health Self Insurance Personnel Costs	2,420,277	3,128,654	2,653,832	2,975,157	-4.9 %
Operating Expenses	241,872,087	255,546,145	245,813,159	269,897,851	5.6 %
Employee Health Self Insurance Expenditures	244,292,364	258,674,799	248,466,991	272,873,008	5.5 %
PERSONNEL					
Full-Time	0	0	0	0	—
Part-Time	0	0	0	0	—
FTEs	25.25	25.25	25.25	23.65	-6.3 %
REVENUES					
Investment Income	267,611	204,660	527,600	562,010	174.6 %
Medicaid/Medicare Reimbursement	1,236,005	0	0	0	—
Other Charges/Fees	6,512,529	0	0	0	—
Self Insurance Employee Health Income	64,309,242	261,465,858	260,184,453	281,967,908	7.8 %
Employee Health Self Insurance Revenues	72,325,387	261,670,518	260,712,053	282,529,918	8.0 %

GRANT FUND - MCG

EXPENDITURES					
Salaries and Wages	0	0	0	0	—
Employee Benefits	0	0	0	0	—
Grant Fund - MCG Personnel Costs	0	0	0	0	—
Operating Expenses	7,676	0	0	0	—
Grant Fund - MCG Expenditures	7,676	0	0	0	—
PERSONNEL					
Full-Time	0	0	0	0	—
Part-Time	0	0	0	0	—
FTEs	0.00	0.00	0.00	0.00	—
REVENUES					
Miscellaneous Revenues	7,676	0	0	0	—
Grant Fund - MCG Revenues	7,676	0	0	0	—

BUDGET SUMMARY

	Actual FY18	Budget FY19	Estimate FY19	Recommended FY20	%Chg Bud/Rec
DEPARTMENT TOTALS					
Total Expenditures	252,489,153	267,430,491	257,000,565	281,820,607	5.4 %
Total Full-Time Positions	68	69	69	68	-1.4 %
Total Part-Time Positions	3	3	3	2	-33.3 %
Total FTEs	69.90	70.90	70.90	68.65	-3.2 %
Total Revenues	72,333,063	261,670,518	260,712,053	282,529,918	8.0 %

FY20 RECOMMENDED CHANGES

	Expenditures	FTEs
COUNTY GENERAL FUND		
FY19 ORIGINAL APPROPRIATION	8,755,692	45.65
<u>Changes (with service impacts)</u>		
Enhance: OMS Contractor Support [Labor and Employee Relations]	223,225	0.00
Eliminate: Abolish M1 Position (General Fund) [Recruitment and Selection]	(107,281)	(0.40)
Reduce: Labor Negotiations Support	(176,473)	(1.00)
<u>Other Adjustments (with no service impacts)</u>		
Increase Cost: FY20 Compensation Adjustment	173,377	0.00
Shift: Position Transfer - from HHS to Police Stress Management [Health & Employee Welfare]	114,241	1.00
Increase Cost: Annualization of FY19 Personnel Costs	74,759	0.25
Increase Cost: Retirement Adjustment	13,814	0.00
Decrease Cost: Office Supplies [Director's Office]	(3,885)	0.00
Decrease Cost: Management Training Programs [Business Operations and Performance]	(19,870)	0.00
Decrease Cost: Partial Suspension of Senior Fellows Program [Business Operations and Performance]	(50,000)	(0.50)
Decrease Cost: Tuition Assistance [Business Operations and Performance]	(50,000)	0.00
FY20 RECOMMENDED	8,947,599	45.00

EMPLOYEE HEALTH SELF INSURANCE

FY19 ORIGINAL APPROPRIATION	258,674,799	25.25
<u>Changes (with service impacts)</u>		
Eliminate: Abolish M1 Position (Employee Health Self Insurance Fund) [Recruitment and Selection]	(160,922)	(0.60)
<u>Other Adjustments (with no service impacts)</u>		
Increase Cost: Claims Expenditure Adjustment [Health & Employee Welfare]	14,222,066	0.00
Increase Cost: Adjustment to Administrative Operating Expenses [Health & Employee Welfare]	129,640	0.00
Increase Cost: FY20 Compensation Adjustment	88,665	0.00
Increase Cost: Retirement Adjustment	7,943	0.00
Decrease Cost: Annualization of FY19 Personnel Costs	(89,183)	(1.00)
FY20 RECOMMENDED	272,873,008	23.65

PROGRAM SUMMARY

Program Name	FY19 APPR Expenditures	FY19 APPR FTEs	FY20 REC Expenditures	FY20 REC FTEs
Director's Office	2,687,509	19.40	3,057,709	21.40
Business Operations and Performance	2,617,465	14.75	2,250,985	12.50
Recruitment and Selection	1,516,677	10.40	1,597,610	10.40
Labor and Employee Relations	3,159,638	8.00	3,264,726	7.00
EEO Compliance and Diversity Management	428,893	3.00	441,492	3.00
Health & Employee Welfare	257,020,309	15.35	271,208,085	14.35
Total	267,430,491	70.90	281,820,607	68.65

CHARGES TO OTHER DEPARTMENTS

Charged Department	Charged Fund	FY19	FY19	FY20	FY20
		Total\$	FTES	Total\$	FTES
COUNTY GENERAL FUND					
Fire and Rescue Service	Fire	1,423,318	0.00	1,591,025	0.00
Police	General Fund	295,333	2.00	307,101	2.00
NDA - Montgomery County Employee Retirement Plans	Employees Retirement Savings Plan (RSP)	24,209	0.20	26,230	0.20
NDA - Montgomery County Employee Retirement Plans	Retirement Fund (ERS)	207,290	0.40	186,251	0.40
NDA - Montgomery County Employee Retirement Plans	Non-Appropriated Funds	34,740	0.00	26,390	0.00
Total		1,984,890	2.60	2,136,997	2.60

FUTURE FISCAL IMPACTS
CE RECOMMENDED (\$000S)

Title	FY20	FY21	FY22	FY23	FY24	FY25
COUNTY GENERAL FUND						
EXPENDITURES						
FY20 Recommended	8,948	8,948	8,948	8,948	8,948	8,948
No inflation or compensation change is included in outyear projections.						
Labor Contracts	0	16	16	16	16	16
These figures represent the estimated annualized cost of general wage adjustments, service increments, and other negotiated items.						
Subtotal Expenditures	8,948	8,964	8,964	8,964	8,964	8,964

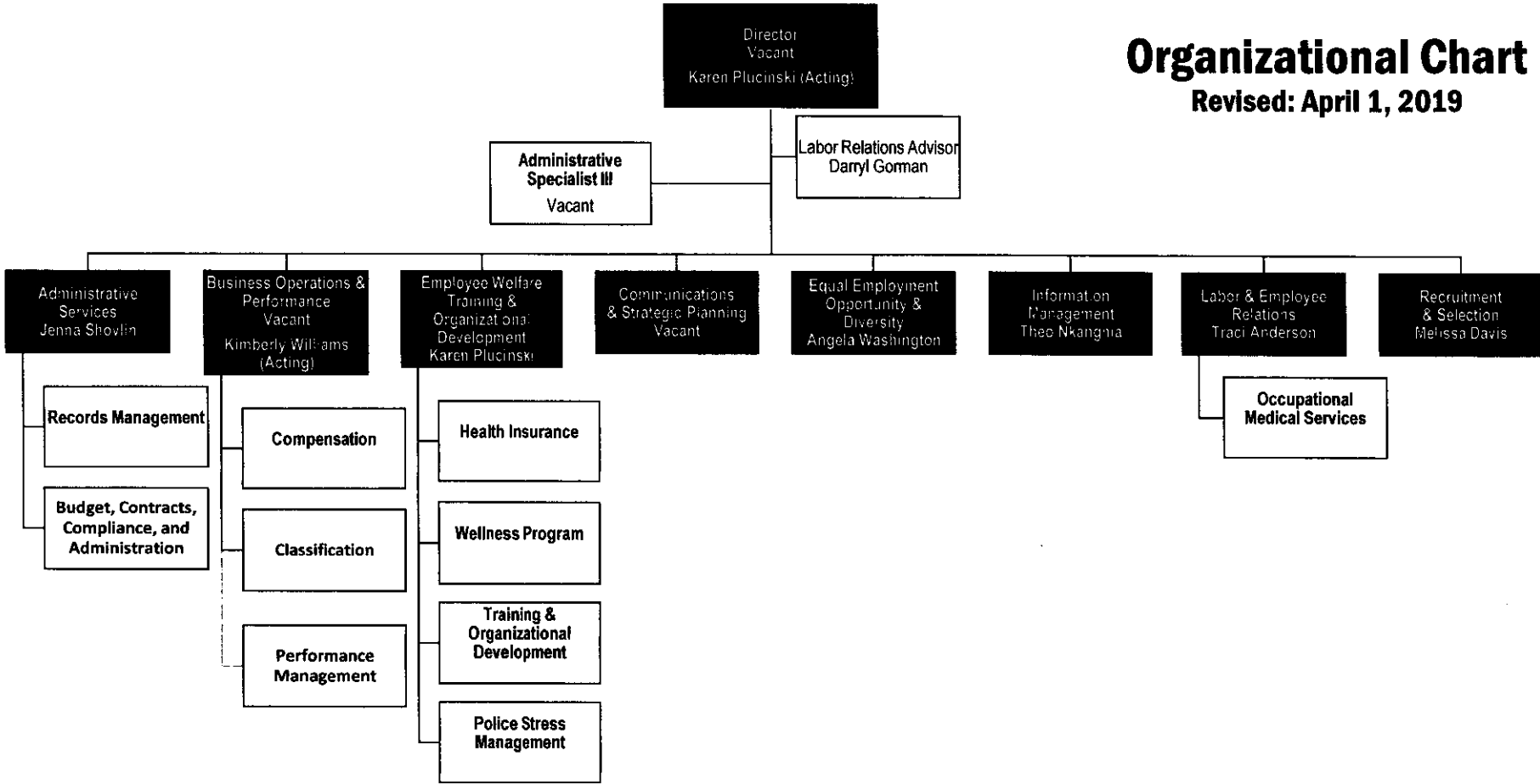
EMPLOYEE HEALTH SELF INSURANCE

EXPENDITURES						
FY20 Recommended	272,873	272,873	272,873	272,873	272,873	272,873
No inflation or compensation change is included in outyear projections.						
Labor Contracts	0	11	11	11	11	11
These figures represent the estimated annualized cost of general wage adjustments, service increments, and other negotiated items.						
Subtotal Expenditures	272,873	272,884	272,884	272,884	272,884	272,884

8

Organizational Chart

Revised: April 1, 2019



Office of *Human Resources*

6

Why is this measure important?

This measure gives an indication of how long a department may be without resources, and this number can be compared to external benchmarks.

Factors contributing to performance

- OHR launched the enhanced candidate qualification process and system aimed at reducing the time to generate an eligible list to hiring managers, improving the candidate pool and reducing the time to fill vacant positions. The enhanced process yielded faster generation of an eligible list to hiring managers by approximately 10 days.
- OHR held information sessions on the new candidate qualification system to instruct departments on how to use adapt to and use the new system.

Factors restricting performance improvement

- Timeliness of Hiring Departments after receiving the Eligible List.
- Availability of interviewers and interviewees.
- Occupational Medical Clearances, Background investigations, Testing and Examination Processes, Interview Process, Wage Equity Review and Approvals and the Hiring Preference Process.
- Change Management Process - OHR staff and hiring departments transition to the enhanced process that requires more upfront dialog to better identify and create an effective job announcement and

- OHR Specialists work closely with departments to ensure the hiring process moves efficiently.
- recruitment strategies to fulfill department needs.
- Other factors restricting performance improvement include: hiring freeze, position exemption process and hard to fill positions.

Performance improvement plan

- Continue employee and department training on the Recruitment and Selection Process.
- Continue to offer education and training to hiring departments on the Recruitment and Selection Process.
- Expand the use of "Resource Labs" to other departments to assist hiring managers with the Recruitment and Selection Process.
- Continue to enhance the OHR website as a friendlier resource to educate both internal and external stakeholders.
- Collaborate with business partners on ways to recruit for "hard to fill" jobs.

Candidate Qualification

What was the Feedback?



2/7/2019

System Issues

Feedback

- System time-out; cumbersome to re-login
- Assessment sections not clearly defined; applicants unclear where they are in the assessment process
- No email notification to applicant of successful completion of application
- Training for employees

Status

- Testing fixes to eliminate the time-out
- Added instructions for each section and identified number of questions in the section
- Added to priority list of system issues for iRecruitment
- Added training sessions for employees and potential applicants



Process Issues

Feedback

- Takes too long to complete assessment
- Expected applicants not on the “well-qualified” list; expected applicants did not minimally qualify; applicant minimally qualified in the past
- System did not appropriately qualify or not qualify applicants
- Applicants can't see all questions or preview answers

OHR Response

- Process change from resume upload only to applicant self selecting education and experience; transfer of responsibility to applicant
- Applicants self-select responses representing their qualifications; job announcement not aligned to the job classification level; and review and validation of resumes for applicants on eligibility list
- Minimum qualifications were not appropriately identified in the upfront recruitment activities
- Applicants can take as long as required to complete assessments and return to previous questions within the section



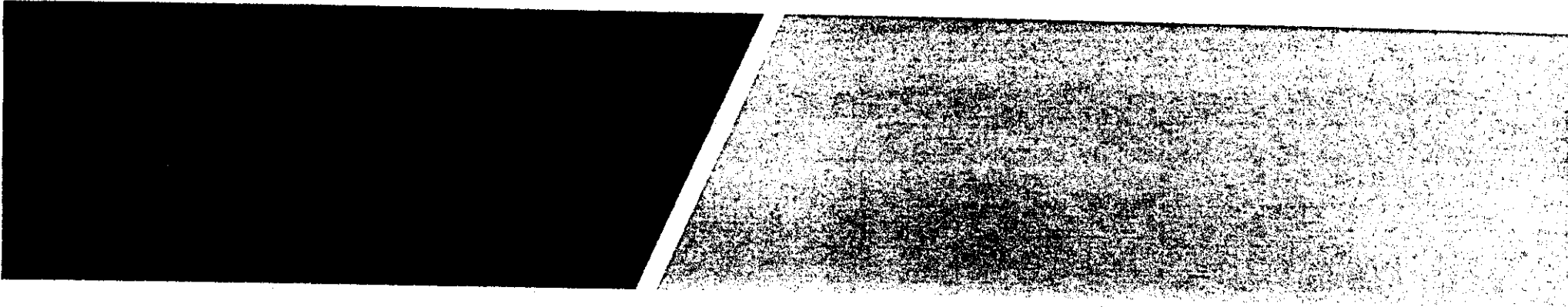
2/7/2019

Office of *Human Resources*

Lessons Learned

- Underestimated the following:
 - Upfront time required for strategic recruitment activities
 - Level of understanding related to:
 - Job Classifications
 - Minimum relevant experience
 - Minimum knowledge, skills and abilities
 - Job equivalencies
 - Level of education and training required to transition to an automated qualification process
 - Impact of current iRecruitment system concerns/issues on the enhanced employment application process
- Clearly define expectations for all stakeholders
- More upfront education and training
- More examples





Candidate Qualification

What are the Results?



2/7/2019

Pilot Period Results



ian Resources

2/7/2019

30

17

Survey Focus

- Key department postings during pilot period (*June 2017 – December 2017*)
 - 80 job vacancies
 - 22 departments
 - 62 hiring managers and HR Liaisons
- Stakeholder Recruitment and Selection experience with enhanced candidate qualification process:
 - Eligibility list
 - Quality of candidates
 - Process enhancements
 - Process challenges



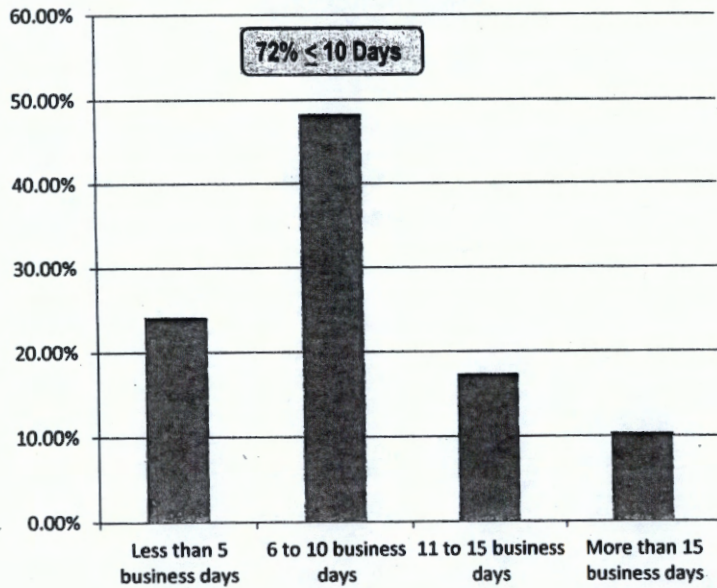
Survey Results

- 29 Responses
- ~47% Participation
- 97% Respondents posted a job within the last 6 months
- 69% Respondents hired a candidate from the Eligible List

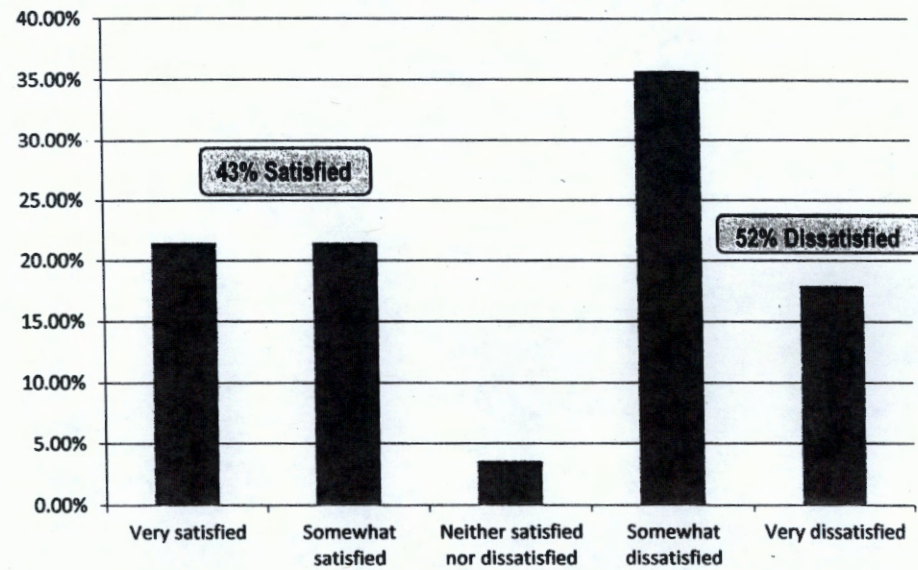


Eligibility List

Average Time to Receive Eligibility List



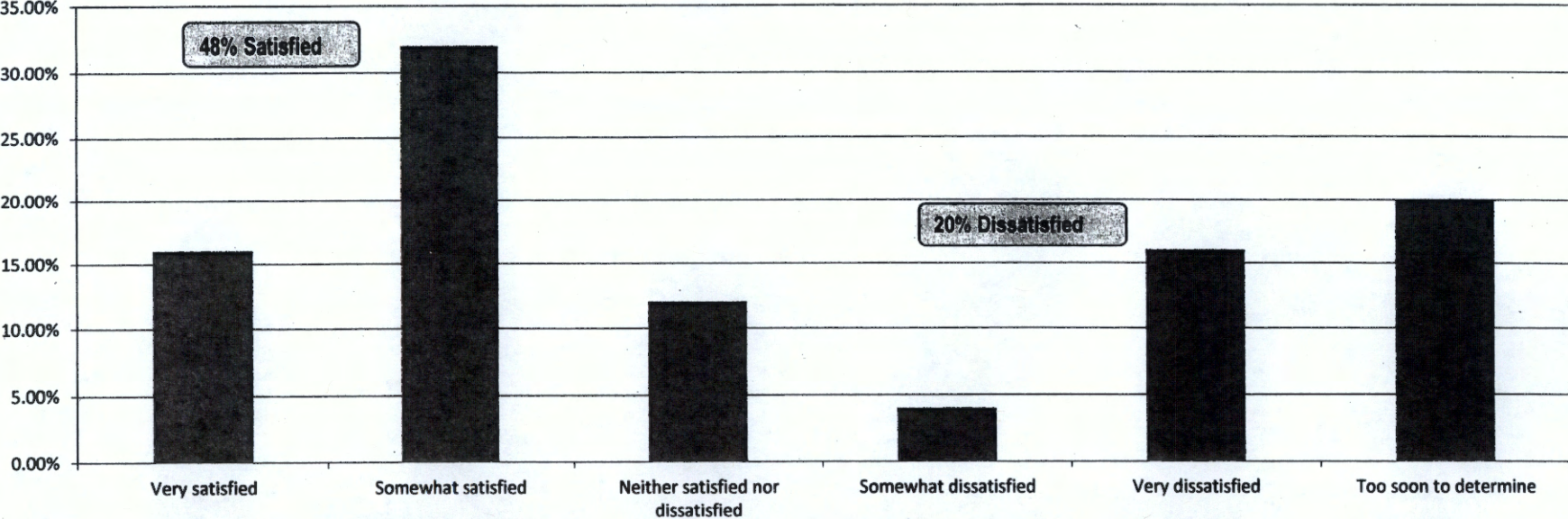
Quality of Eligibility List



Office of *Human Resources*

Quality of Candidates

Quality of Hire



Process Enhancements

No.	Category	Stakeholder Feedback
1.	Quick turnaround for Eligibility List	<ul style="list-style-type: none"> ✓ Eliminated number of manual resume touches ✓ Quick to get eligibility list ✓ Received eligible list much faster than the previous process
2.	Preferred Criteria Responses	<ul style="list-style-type: none"> ✓ Better identification of qualified candidates ✓ Review of screening process was very helpful ✓ Ability to see the candidate's preferred criteria responses
3.	No Rater Reviewers	<ul style="list-style-type: none"> ✓ Time saved from the elimination of paper rating ✓ Not having to assign staff to do rater review



22

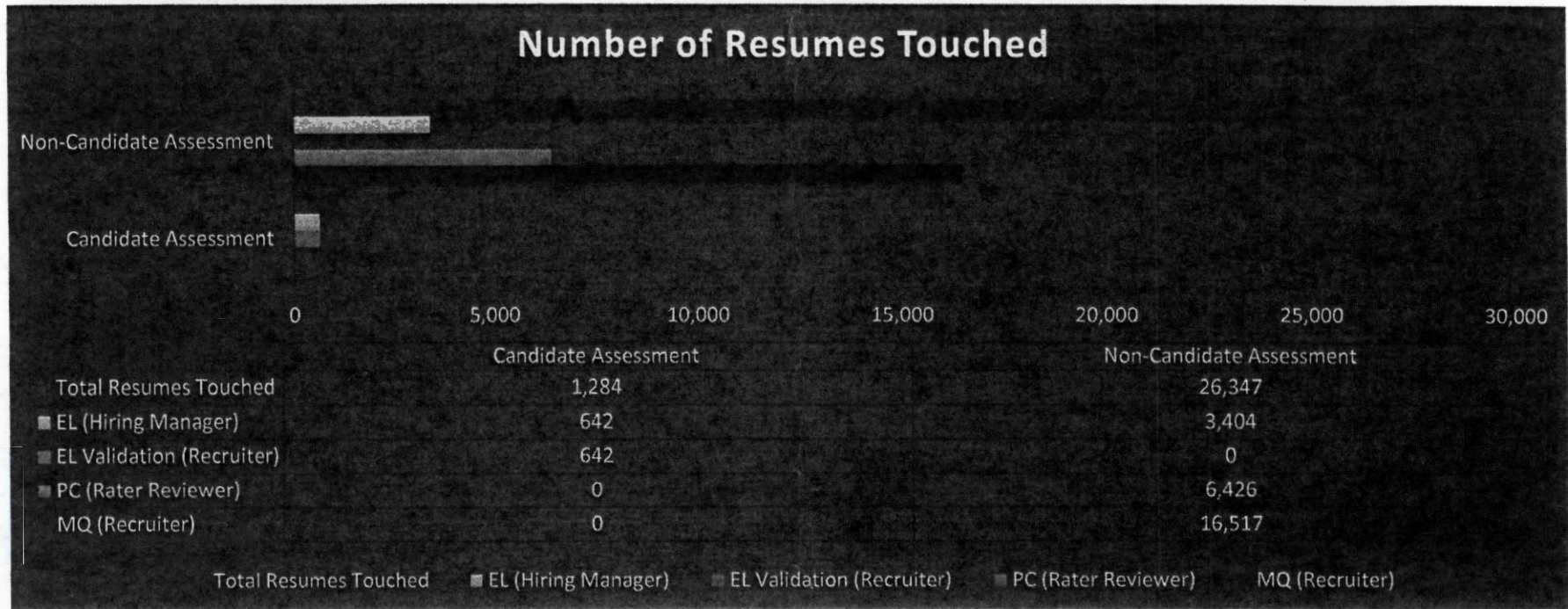
Process Challenges

No.	Issues	Stakeholder Feedback	OHR Actions
1.	Upfront work	<ul style="list-style-type: none"> ✓ Takes too much time ✓ Preparing MQ and PC documentation takes time ✓ Time to develop preferred criteria took weeks ✓ Preferred criteria took months to create ✓ Labor intensive ✓ Takes too long ✓ Process takes OHR too long to get the job posted 	<ul style="list-style-type: none"> • Department labs and briefings • More MQ and PC templates • Recruiter review and validation of candidates • Follow-up with departments on specific issues • Work with departments to identify solutions • Working sessions with Hiring Managers and HR Liaisons to Create Strategic Partnerships • Ongoing evaluation of process
2.	Assessment not effective	<ul style="list-style-type: none"> ✓ Quality of candidates that make it to the eligible list ✓ Caliber of candidates getting through to eligible list ✓ Not getting the best candidates ✓ Candidate responses are not aligned to resume ✓ Eligible list candidates noticeably different in their experience and skill base 	



23

Process Touches



4

Council Staff Questions
FY20 Office of Human Resources Operating Budget

The GO Committee worksession is scheduled for April 11 at 2:30 p.m. in the 7th floor Hearing Room. I will need responses to questions and any other material for inclusion in the packet by Friday, April 5.

General

1. For inclusion in the packet, please list the names and titles of staff who may be speaking at the worksession.
 Karen Plucinski, Acting Director, OHR
 Jenna Shovlin, Manager, Administrative Services Manager, OHR
 Corey Orlosky, Fiscal and Policy Analyst, Office of Management and Budget
 Kimberly Williams, Acting Manager, Business Operations and Performance, OHR
2. Please provide an updated organizational chart. (See Attached)
3. Please provide a table with current OHR vacancies (title & grade, division, fund, cost center, and status).

Position	Grade	Fund	Cost Center	Division	Status
000857.Director Office of Human Resources.007946.FT.E.		001	33100	OHR 33 Director's Office	Search Underway
000905.Manager II.000111.FT.P.	MII	001	33200	OHR 33 Business Operations and Performance Division	Hiring on hold pending new Director
014952.Manager II.000111.FT.P.2	MII	625	33700	OHR 33 Health and Employee Welfare Division(DIV)	Position has been abolished as part of FY20 budget (E3-19 legislation)
000900.Manager II.000111.FT.P.	MII	001/625	33100	OHR 33 Communications and Strategic Planning Team	Hiring on hold pending new Director
016505.Senior/Lead Performance Management and Data Analyst.000115.FT.P.2	30	001/625	33230	OHR 33 Classification and Compensation Team	Position has been abolished as part of FY20 budget - Reduction Plan
000852.Human Resources Specialist III.000121.FT.P.2	25	625	33700	OHR 33 Health Insurance Team	Recruitment almost complete
000872.Human Resources Specialist III.000121.FT.P.	25	001	33300	OHR 33 Labor and Employee Relations Team	Hiring on hold
003884.Human Resources Specialist III.000121.FT.P.3	25	001	33500	OHR 33 Recruitment and Selection Division	Hiring on hold
011184.Human Resources Specialist III.000121.FT.P.	25	001	33230	OHR 33 Classification and Compensation Team	Hiring on hold
012631.Human Resources Specialist III.000121.FT.P.	25	001	33300	OHR 33 Labor and Employee Relations Team	Hiring on hold
015220.Administrative Specialist III.000150.FT.P.2	23	001	33100	OHR 33 Director's Office	Hiring on hold pending new Director
016678.Administrative Specialist II.000151.FT.P.2	21	625	33210	OHR 33 Administrative Services Team	Recruitment underway
017402.Administrative Specialist II.000151.FT.P.2	21	001/625	33100	OHR 33 Communications and Strategic Planning Team	Hiring on hold
016238.Program Manager II.000832.FT.P.2	25	001	33100	OHR 33 Communications and Strategic Planning Team	Recruitment almost complete
012819.Psychologist.002501.FT.P.	29	625	33810	OHR 33 Stress Management Team	Recruitment almost complete

4. Have any positions been reclassified since publishing the FY19 approved personnel complement? If so, please provide details for each reclassification.

Position 015220 – Reclassified from Oracle Business Analyst to Administrative Specialist III in the Director’s Office

Position 016678 – Reclassified from Administrative Specialist III to Administrative Specialist II in Records Management under Administrative Services.

Position 003884 – Reclassified from a Principal Administrative Aide to a Human Resources Specialist in Recruitment and Selection

Position 000874 – Reclassified from Manager III to Manager II in the Director’s Office

5. Please provide lapse assumptions for FY19, including the 2 positions lapsed during the Savings Plan, and FY20. OHR has budgeted lapse of \$260,660, which must be met by structuring the hiring of vacancies in a manner that ensures the department meets this target.

The FY19 Savings Plan included the following two positions, which were not factored into the budgeted lapse:

Position #015220 – position reclassified to support the Director and Director’s Office with special projects.

Hiring is on hold until a new Director is appointed.

Position #01184 – position has been part time and was vacated in September. The position was approved for full-time and was under review for recruitment; however, the Division Manager left County Government, so OHR held off on hiring this position to allow the new Manager to evaluate potential candidates so that he/she can choose the best fit for the Business Operations team.

6. Questions on Initiatives:

- a. Please provide additional details and outcomes related to the automated training notification for managers and HR liaisons.

The HR Liaisons and department directors currently have access to view a Business Intelligence (BI) Classroom Enrollment Dashboard Report that shows their department’s mandatory training records including the Preventing Workplace Harassment (PWH) training compliance status.

Upon final development and testing, the automated training platform will notify employees, supervisors, HR Liaisons and departments on their mandatory training status. This project was completed in September 2018 and will be implemented into production at the time the on-line Preventing Workplace Harassment Training is implemented in 2019.

Developed and tested additional BI Classroom Enrollment Dashboard Report to help HR Liaisons track and monitor mandatory training compliance for their departments.

OHR is developing multiple training options and methods including webinars, on-line courses, and instructor-led training, to more efficiently and effectively address non-compliance with mandatory training requirements.

OHR is currently designing a program and process to ensure timely:

- Training to address the current number of employees out of compliance
- Training for new hires prior to 90 days of employment

- b. What online and computer-based strategies are being developed to complement instructor lead trainings on preventing workplace harassment?

In FY19 OHR is working with an electronic learning instructional design consultant to develop and enhance the following:

- Existing Preventing Workplace Harassment instructor led training
- Train the Trainer Program to certify additional instructors to teach the Preventing Workplace Harassment Program
- Preventing Workplace Harassment webinars
- Computer-based Training (CBT), which addresses issues related to preventing workplace harassment, bullying, and cyber-bullying.

Working to expand the resources or mechanisms for training by:

- Identifying in-house (department) and external trainers (consultants) to conduct training
 - Expanding use of computer based training and webinar training to reach large groups of employees
- c. Please provide additional details on the cross-functional team to develop and execute background investigation policies and procedures.

The Background Investigation/Suitability Policy work group has been meeting bi-weekly since September 2018. The primary objective of the workgroup is to review, analyze, and document best practices and current trends regarding employee background investigation/suitability processes as the basis for determining a broader strategy and plan to develop a Countywide background investigation and suitability process.

The workgroup consists of individuals from the following County departments:

- Department of Correction and Rehabilitation
- Office of Human Resources
- Police Department
- Fire/Rescue Service
- Department of General Services
- Department of Transportation
- Department of Recreation
- County Attorney's Office
- Department of Health and Human Services
- Department of Finance
- Department of Public Libraries
- Department of Liquor Control

The selected departments offer a diversity of services that are representative of the positions that are appropriate to include within the County's overall policy and approach to background investigations and suitability. A few departments already have extensive background policies that meet their internal needs. One of the goals of the broader policy is to create consistency and equity in the application of executing the background investigations as well as address departments that do not have a policy in place, which opens the County up to potential risk.

In addition to providing the County Attorney and Chief Administrative Office with preliminary recommendations in May/June, the workgroup will conduct focus group sessions with departments not currently assigned to the workgroup to provide them the opportunity to give feedback and comment on the recommendations.

d. What activities are planned or in process to increase focus and awareness on mental health issues?

During the year, the Wellness Team will focus on mental health in high stress areas with emphasis on public safety. The goals and objectives are to create partnerships with key stakeholders within departments with high stress positions and public safety agencies to address and combat the stigma of mental health to encourage employees who need help to seek guidance and assistance. We'll also be taking advantage of the national observances during the year by highlighting mental health topics through coordinated programs and events. April is stress awareness month, May will be dedicated to Mental Health, and December will focus in on Beating the Winter Blues.

Below is a list of events and programs that will be offered during the month of May – Mental Health Month. In addition, all Wellness Wednesday communications for May will feature articles and resources for Mental Health.

Date	Time	Location	Program
5/1	12pm	EOB Auditorium	<i>Seminar: Mental health awareness</i>
5/3	1-2pm	Webinar	<i>The Emotionally Healthy Teen</i>
5/8	11:30am-1:30pm	Public Safety Headquarters	<i>Mental health event mental health awareness EAP Sleep Habits booth Meditation/relaxation mini sessions Walking groups drop in sessions Overcoming stress booth</i>
5/14	11:30 am-1:30pm	EOB – outside plaza	<i>Celebrate You</i> <i>mental health awareness booth seated massages reflexology Mindful Eating Demo Table alcohol awareness goggles Fitness Obstacle Course ComPsych EAP services MCG Rec Department Capital BikeShare Zen Zone</i>
5/15-June 5	5-6:15 pm	DOT Crabbs branch	<i>Diabetes Academy</i>
5/15	TBA	Animal Services	<i>Field Day</i> <i>inbody screenings Relaxation- fitness class Reflective journaling table</i>
5/16	12-1pm	Webinar	<i>Understanding Depression</i>
5/29	12-1 pm	Webinar	<i>Understanding Mental Health</i>

5/30	9am-1pm	ECC	<i>Mental Health First Aid Class</i>
TBA		Piccard Ave.	Mental Health Workshop

7. Questions on innovations and productivity improvements:

- a. Please provide additional details on steps taken to provide the eligible list of candidates within 7 to 10 business days.

OHR implemented the candidate assessment application (ProForm©) in 2017 to address longstanding issues with the time to hire and ensure internal applicants have access to job opportunities that consider relevant experience. The assessment tool automated a highly manual and inconsistent rater review process that was fulfilled by the Recruitment Specialists to identify candidates that met the minimum qualifications followed by the department hiring managers that had to then review all resumes submitted to them by Recruitment to identify well qualified candidates to select for interviews. The entire process generally took several months and was inefficient and burdensome to OHR and the departments.

With the implementation of ProForm©, each applicant must complete an automated candidate assessment when applying for a County position. While the implementation of the new system has not been without its challenges, the timeline to provide departments with a well-qualified list occurs within 7-10 days after the close of the job posting.

OHR quickly recognized that the change cut down the delivery time of the well qualified list, but a body of work was created at front end of the process that required greater input and collaboration with departments to design the candidate assessment. Recruitment Specialists work directly with department hiring managers to develop assessments and have taken on a greater role as a consultative partner to match up position descriptions/job classifications with the assessments. Regular meetings are conducted with larger departments and/or those departments with high numbers of hiring throughout the year to create a timeline and structure to the end to end hiring process. The candidate assessment is just one aspect of the larger end to end process and the primary change to the way we do business has been the shift from the transactional nature of the Recruitment Specialist's work to the more collaborative approach currently in place.

- b. Please provide additional details on the Wage Equity training?

Provided One-on-One interaction with HR Liaisons

Trainings were given to the HR Liaisons during the month of March 2018

Dates were as follows: March 1 (pilot to OHR Recruitment and Managers), March 7, March 14, March 20, March 22, and March 28. (see attached presentation)

Training focused on:

- Process
- Determining Wage Equity
- Roles and Responsibilities

Director's Office

8. Please breakout the multi-program adjustments resulting in added expenditures of \$374,085 and an addition of 2.0 FTEs.

The adjustment includes a 1.0 MII that was transferred from Labor and Employee Relations to the Director's Office and a 1.0 Administrative Specialist III that was shifted from Employee Health and Welfare to the

Director's Office under the Administrative Services Section to provide contracts, accounts payable, and purchasing support.

Business Operations and Performance

9. How much is budgeted for reclassification studies for bargaining and non-bargaining unit employees in FY20?
 Occupational Classification Studies = \$105,000 is unchanged from FY19
 Individual Classification Studies = an appropriation of \$25,000 is included for represented employees.
 Unrepresented employee individual classification studies are paid by the department requesting the study.

10. Please provide a copy of the most recent MLS Annual Report.
 The MLS Annual report was incorporated into the PMR, which can be found at the following site:
[https://www.montgomerycountymd.gov/HR/Resources/Files/Classification/Compensation%20Documents/PMR Document April 2018 Final.pdf](https://www.montgomerycountymd.gov/HR/Resources/Files/Classification/Compensation%20Documents/PMR%20Document%20April%202018%20Final.pdf)
 The 2019 PMR is in the final stages of completion and will be uploaded to the OHR website once done.

11. What is the participation and cost of the Multi-lingual pay program?

Title	FY18 Actuals Total Dollars	FY18 Actuals # of EE's	FY19 Total Dollars As of 3/30/19	FY19 # of EE As of 3/30/19
Fire	\$176,707	141	\$127,095	140
Non-Union	\$237,669	163	\$191,204	163
OPT	\$1,100,625	871	\$865,421	871
Police	\$413,540	234	\$321,554	239
SLT	\$238,562	241	\$190,051	244
Grand Total	\$2,167,102	1,650	\$1,695,326	1,657

12. What enhancements or changes have been made to the Training and Organizational Development Team in FY19? Are there any program enhancements planned in FY20?

FY19:

- Continue implementing the MLS Leadership Development learning modules. Each module offers unique learning opportunities through special events and classes geared toward developing a leadership mindset:
 - Learns: Informational and networking events (Quarterly)
 - Explores: Book club and tours of MCG facilities (Quarterly)
 - Achieves: Distinguished speaker series (semiannually)
 - Delivers: Cross-departmental projects (annually)
 - Serves: Community Service projects (Annually)

Since the program was introduced in April 2018, over 1,146 managers have participated in MLS LEADS events with an overall rating of 90% or above. Communication tools that encourage sharing of

information and cross-departmental collaboration have also been implemented through a SharePoint site and a monthly electronic newsletter.

- Revised and enhanced the National Association of Counties (NACo) Recognition Program Awards by rebranding the event to the Montgomery County Government Recognition Excellence Celebration to encourage greater employee engagement and align the ceremony with NACo's mission to highlight visionary County leadership, innovation, and resilience in improving the quality of life for the County's residents. In 2018, the ceremony also included awards the County received from organizations such as the Alliance for Workplace Excellence, International City/County Management Association (ICMA), Corporate Health and Wellness Association, and ComPsych Corporation.
- Developed and offered an Interagency Administrative Professionals Day Conference, which was attended by over 250 employees from Montgomery County Government, Montgomery County Public Schools, and the Housing Opportunities Commission.
- Spearheaded and implemented a career development event for County employees' children called Explore Career Possibilities—Workforce Development for All, which is the 2019 theme for the National Take Your Child to Work Day. More than 20 County departments are participating in the development of the program that emphasizes careers with the County.
- Developed and offered an "Aspiring Leaders Book Club" to County employees. The first two sessions were attended by more than 100 employees and featured Brian Elms, author of the book "Peak Performance: How Denver's Peak Academy is Saving Money, Boosting Morale, and Just Maybe Changing the World (and You Can, Too!).

FY20

- Develop a long-term Organizational Leadership Development Strategy for Management Leadership Services (MLS) to include formalized learning, mentoring programs, new manager resources.
- Fully implement the mandatory training notification process for Preventing Workplace Harassment Training.

13. How much is budgeted for Tuition Assistance for bargaining units and non-bargaining employees?

FY20 Tuition Assistance = \$385,000

MCGEO \$125,000

IAFF, Volunteer FF, Unrepresented - \$125,000

FOP - \$135,000

14. How much was expended in FY19 for the Tuition Assistance program?

As of March 30th, total expenses* for the Tuition Assistance program are as follows:

MCGEO: 136,102.49

IAFF, Volunteer FF, Unrepresented: \$123,250.72

FOP: \$47,494.10

64122 - Tuition Assistance - Municipal & County Government Employees Organization (MCGEO)	136,102.49
64123 - Tuition Assistance - International Association of Firefighters (IAFF)	39,702.34
64124 - Tuition Assistance - Volunteer Firefighters	11,370.00
64125 - Tuition Assistance - Fraternal Order of Police (FOP)	47,494.10
64126 - Tuition Assistance - Unrepresented	72,178.38

*General Ledger Details – Expenditure Tracking BI Dashboard

15. Why is \$50,0000 being cut in FY20 for the Tuition Assistance program?
The cut was included as part of OHR’s reduction plan for FY20. Funds in the amount of \$135,000 designated under the FOP CBA are not impacted. The remaining balance for MCGEO, IAFF, Volunteer Firefighters, and Unrepresented employees will be reduced by \$50,000 from \$300,000 to \$250,000. An estimated 26 eligible employees will be unable to participate in the program as a result of this reduction.

16. Why is a partial suspension of the Senior Fellows program (\$-50,000) being recommended in FY20? What would be the remaining budget for the program in FY20?
The reduction was submitted as part of the required reduction plan and will leave \$50,000 (.5) in the program for FY20.

17. Please provide details on the Management Training Programs and the recommended reduction of \$19,870.
The funding was used as an offset to cover the costs of administrative support needed to manage the County's training programs. Training and Organizational Development will seek other alternatives to provide this support, which was already underway.

19. Please breakout the multi-program adjustments resulting in an expenditure reduction of \$246,610 and 1.75 FTEs.
The adjustment includes the reduction of the Sr. Performance Analyst position, increase of .25 FTE for a part time position and a shift of the 1.0 MI position to Recruitment and Selection, which had been allocated to Business Operations at the time the FY19 budget was approved.

Recruitment and Selection

20. Please confirm if the 0.4 and 0.6 FTEs are tied to Bill 3-19E Non-Merit Positions? If so, is there a retirement incentive program planned for employees affected by this legislation in occupied positions in OHR, Procurement, and Liquor Control?
The 0.4 and 0.6 FTEs are tied to Bill 3-19E and is the 1.0 FTE – Manager I.
We are not aware of a plan to implement a retirement incentive program.

21. Please breakout the multi-program adjustments resulting in added expenditures of \$349,136 and one additional FTE.
The shift of the MI into this division and subsequent decision to abolish the position was offset by the adjustments outlined in #20. The remaining amount is a result of benefits changes and increases.



Labor and Employee Relations

22. How many employees are participating in the commuter tax benefits program? 48 employees
23. Please breakout the multi-program adjustments resulting in an expenditure reduction of \$118,137 and 1.0 FTEs.
The adjustment of 1.0 FTE is for one position shifting from Labor and Employee Relations to the Director's Office and additional funds allocated to the new Labor Manager, changes in benefits account for the variance.

EEO Compliance and Diversity Management

24. Please breakout the multi-program adjustments resulting in added expenditures of \$12,599.
The adjustment is a result of employee benefits changes and increases.

Health and Employee Welfare

25. Please provide an update on the use of MC311 Tier II system for employee HR calls, including complaints, feedback, and ongoing meetings to refine processes.
The Health Insurance Team continues to partner with MC311 to improve the experience for our customers. An annual review of the Knowledge Based Articles (KBA's) was performed to ensure that MC311 call takers have accurate information when answering questions. This included updating key words for searches and revising answers to ensure relevance. There are approximately 140 KBA's that the team maintains. The Health Insurance Team and MC311 meet several times throughout the year to review the process and identify areas that need improvement. The Health Insurance Team conducts trainings to MC311 call takers prior to the annual open enrollment period to educate them on changes in employee benefits. In addition, any correspondence that is sent to employees or retirees is provided to MC311 in advance so they can be prepared to handle incoming calls.

The "Verify Health Coverage" for the active employees and retirees continues to be the categories that have the largest number of service requests with a 45% jump in 2018. The County executed new contracts for dental, vision, and life insurance which contributed to the spike in calls.

Knowledge Based Article (KBA)	2017 # of Service Requests	2018 # of Service Requests	% Change
Retiree - Verify Health Insurance Coverage	378	547	45%
Participating Agency Employee - Verify Health Insurance Coverage	21	10	-52%
Employee - Health Insurance Carrier Requires Current Information	51	39	-24%
Employee Verify Health Insurance Coverage	599	624	4%

Retiree - Group Insurance Cost Share	154	129	-16%
TOTAL Tier II	1,203	1,008	-16%
<i>Number of OHR Service Requests Created for the year</i>	11,792	11,228	-5%
<i>Number of General Information Calls</i>	7,994	7,756	-3%
<i>Number of Fulfillment</i>	3,798	3,472	-9%
<i>Number of Tier 2 Calls</i>	1,203	1,349	12%

26. Please breakout the multi-program adjustments resulting in an expenditure reduction of \$278,171 and 2.0 FTEs.

The adjustment abolishes a 1.0 Division Manager II position and shifts a 1.0 Administrative Specialist position to the Director's Office under Administrative Services for contracts, accounts payable, and purchasing support. The remaining amount is a result of benefits changes and increases

27. Please provide information on Family Medical Leave Act usage by County employees for FY18 and estimated requests for FY19.

FY	Total # of Requests
FY18	1,848
FY19	1,297 thru Q3 (3/30/19)

28. Please provide statistics on participation by employees in supplemental benefits programs.

- a. Optional Life Insurance - 5,698 employees enrolled
- b. Short Term Disability (AFLAC) - 134 employees
(only unrepresented and IAFF employees are eligible to participate)
- c. Critical Illness (AFLAC) - 107 employees
(only unrepresented and IAFF employees are eligible to participate)

29. Are there participation figures for employees enrolled in the weight management programs with health insurance carriers?

- a. United HealthCare = 130 participants
- b. Kaiser = 18
- c. CareFirst = 10 Participants