Compensation

Our budget includes the following increases to base pay:

- 2% (Fire, non-union, and elected officials)
- TBD (Police, AFSCME)
Compensation - Salary Survey Update

- Completed: Non-union, elected officials.
- Elected officials - waiting until next election.
- Non-union market adjustments were implemented for year one.
- Additional adjustments are in the 2019 budget ($275,000 placeholder).
- Preliminary date from union study has been shared is being utilized in current negotiations.
Benefits - Category 1 - Personnel Services

- **Line 121** Federal Insurance Contributions Act (FICA) tax remains at 7.65% of compensation for fiscal year (fy) 2018
- **Line 122** Public Employees Retirement Fund (PERF) contribution for non-public safety employees is 14.2% and 21.5% for sworn public safety employees.
Benefits - Category 1 - Personnel Services

The Health Insurance Trust (HIT) is the pool of money used for the administration of our employees’ health and wellness benefits.

- **Line 123 - Health Insurance Trust (HIT):** Contribution for all benefit eligible employees remains at $14,274.
Benefits - Health Insurance

- The City of Bloomington has been a member of the AIM, formerly IACT, Medical Trust, since January 1, 2011.
- In 2010, there were 4 charter member municipalities of the Medical Trust.
  - It now has 45 member cities and towns.
- The City continues to have a leadership role by serving on the Medical Trust’s Board of Trustees.
2019 Benefits - Health Insurance

- 4 years of no rate increases for employees.
- 2018 rates renewal rate increase was 5.1%, projected at 7%. The City absorbed the increase.
- 2019 health insurance rate increases from our insurer, AIM, are projected to be higher than normal this year.
- AIM’s renewal rates will be determined later this year.
- **We do not anticipate passing this increase to our employees**, nor do we anticipate any plan changes.
# Benefits - Health Insurance

## Annual Renewals Comparison

<table>
<thead>
<tr>
<th>YEAR</th>
<th>CITY</th>
<th>MEDICAL TREND</th>
<th>PREMIUM SAVINGS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>14.20%</td>
<td>12.00%</td>
<td>-$146,526.00</td>
</tr>
<tr>
<td>2013</td>
<td>5.00%</td>
<td>12.00%</td>
<td>$368,675.00</td>
</tr>
<tr>
<td>2014</td>
<td>2.90%</td>
<td>12.00%</td>
<td>$1,140,168.00</td>
</tr>
<tr>
<td>2015</td>
<td>1.50%</td>
<td>10.50%</td>
<td>$200,003.00</td>
</tr>
<tr>
<td>2016</td>
<td>5.00%</td>
<td>10.50%</td>
<td>$2,669,082.00</td>
</tr>
<tr>
<td>2017</td>
<td>0.80%</td>
<td>10.50%</td>
<td>$3,799,466.00</td>
</tr>
<tr>
<td>2018</td>
<td>5.10%</td>
<td>10.50%</td>
<td>$482,873</td>
</tr>
</tbody>
</table>

Grand Total: $8,513,742
Benefits - Health Insurance

![Graph showing renewals vs. medical trend](image-url)
Benefits - Dental and Vision Plans

- The dental plan remains self-funded and administered through a third-party administrator and network.
- The vision plan remains fully insured through a third-party administrator and network.
- After 4 years of no cost increases, we anticipate slight cost increases to our vision insurance.
- No substantive plan changes are anticipated in either plan for 2019.
Benefits - Other

- Short and Long Term Disability
- Basic Life & Accidental Death Insurance
- Voluntary Term Life Insurance
- 457(b) Retirement Plan
- Health Savings Accounts (HSA)
- Flexible Spending Accounts (FSA)
Benefits - Other

- Employee Assistance Program (EAP)
- Health Club Membership & Massage Therapy Reimbursement
- Bike Commuter Program
- Flu Shots
- Biometric Screenings
### 2018 CITY OF BLOOMINGTON COMPENSATION STATEMENT

<table>
<thead>
<tr>
<th>Category</th>
<th>City Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INSURANCE &amp; WELLNESS</strong></td>
<td>$14,275.00</td>
</tr>
<tr>
<td>Medical, Dental, Vision</td>
<td></td>
</tr>
<tr>
<td>Life/T Disability Insurance and EAP Services</td>
<td></td>
</tr>
<tr>
<td>Wellness Benefits</td>
<td></td>
</tr>
<tr>
<td>Gym and Massage Reimbursement and Bicycle Commuter</td>
<td></td>
</tr>
<tr>
<td>Health Savings Account Contribution</td>
<td></td>
</tr>
<tr>
<td><strong>PERF</strong></td>
<td>$7,100.00</td>
</tr>
<tr>
<td>3% Annuity</td>
<td></td>
</tr>
<tr>
<td>11.2% Defined Benefit Contribution</td>
<td></td>
</tr>
<tr>
<td><strong>PAID TIME OFF</strong></td>
<td>$7,115.38</td>
</tr>
<tr>
<td>Based on 200 hours</td>
<td></td>
</tr>
<tr>
<td>Twelve (12) Paid Holidays per year</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>SubTotal Benefits</td>
<td>$28,490.38</td>
</tr>
<tr>
<td>Your Salary</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>% of salary</td>
<td>66.98%</td>
</tr>
<tr>
<td><strong>Salary Plus Benefits</strong></td>
<td>$78,490.38</td>
</tr>
</tbody>
</table>

In addition, these non-discretionary benefits are provided to each employee:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security (6.2% of salary)</td>
<td>$3,100.00</td>
</tr>
<tr>
<td>Medicare (14.5% of salary)</td>
<td>$725.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add'l Benefits</td>
<td>$3,825.00</td>
</tr>
<tr>
<td>Total benefit % of salary</td>
<td>64.63%</td>
</tr>
<tr>
<td><strong>Total Value Salary Plus Benefits</strong></td>
<td>$82,319.38</td>
</tr>
</tbody>
</table>

*This is a brief description of benefits. All values are estimates. Coverage under any of these plans is not guaranteed and benefit values may fluctuate. This benefits statement is, in no way, meant to serve as a contract or guarantee of employment.*
2019 Compensation and Benefits

This concludes my presentation on 2019 Compensation and Benefits.

I would be happy to answer any questions.
Why We Exist

By utilizing innovative, best practices in human resources management, the Human Resources Department exists to create a positive, productive and inclusive work environment that attracts, retains, and develops talent in order to accomplish organizational goals.
Background

- **Department**
  - 6 full-time equivalent employees
- **Major accomplishments**
  - Salary Study
  - 360 reviews for supervisors
  - Employee Performance Reviews
  - Employee Training
  - Employee Recognition Events
2018 Budget Goals Update

Workforce Maintenance

➢ Focus on solving inefficiencies by organizing, maintaining, and/or automating systems by the end of 4th quarter.
➢ Review record-keeping systems and implement a solution for the lack of space.
➢ Create a video presentation for the new employee orientation process for all new regular full-time and part-time employees by the end of the 3rd quarter.
2018 Budget Goals Update

Personnel Policy
➢ Provide clear and consistent communication regarding personnel policies to employees and supervisors.
➢ Evaluate and revise City Policies.
   ● Publish personnel revised personnel manual.
   ● Train all 690 employees on policy changes.
2018 Budget Goals Update

Employee Relations

➢ With the contract negotiation team, successfully negotiate two labor agreements - FOP and AFSCME - by the end of 2018.
➢ Focus on employee morale by improving workplace culture.
➢ Increase human resources presence in the field by meeting with employees and supervisors at their work site.
2018 Budget Goals Update

Compensation and Benefits

➢ Conduct ongoing review of all employee benefits to ensure confidence that our package has the best balance between cost, quality of coverage, and customer service.
➢ Improve efficiency of the open enrollment process without compromising quality.
➢ Improve online access and web-based use for benefits administration.
➢ Increase participation of our employees in our wellness program by 15% based on 2017 participation.
2018 Budget Goals Update

Training and Development
➢ Support the administration's commitment to allocating 1.4% of each department's budget for employee training and development.
➢ Outsource an organizational assessment that spans three years.
➢ Work with the Community and Family Resources Department to conduct diversity and inclusiveness training for all 690 employees.
2019 Budget Goals

Workforce Maintenance

**Activity Description:** Includes recruitment, selection, orientation, record maintenance, termination, and retirement.

- Post all job vacancies within 5 days of receiving a completed requisition from the hiring manager.
- Review all requests for hires within 5 days of receiving the completed hiring request from the hiring manager.
- Improve fair hiring practices by routinely auditing hiring assessments.
- Audit Fair Labor Standards Act classifications for over 250 unique positions.
- Audit EEO-4 and other employee data for approximately 700 employees in New World.
- Work with the Legal Department to implement a document retention and destruction plan, compliant with state and federal regulations.
- Enhance new employee orientation by creating videos and other materials that will make orientation more efficient and consistent.
## Activity Highlight - Workforce Maintenance

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.96</td>
<td>164,948</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>876</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>37,748</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>203,572</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Personnel Policy

**Activity Description:** Develop, interpret and apply personnel policies including the following: new policy development, existing policy updates, and policy interpretation for employees.

- Provide clear and consistent communication to employees and supervisors regarding personnel policies.
- Evaluate and revise City Policies.
  - Update City employee personnel manual to reflect changes.
  - Train all 700 employees on policy changes either through webinars or training sessions.
### Activity Highlight - Personnel Policy

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>0.88</td>
<td>73,638</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>391</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>16,852</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>90,880</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Employee Relations

**Activity Description:** Apply and implement personnel policies including the following: management consultation, employee consultation, labor relations, employee communication, and grievance procedures.

- Send quarterly employee communications in coordination with the Mayor’s office.
- Enhance employee morale by organizing employee recognition events including biannual employee recognition ceremonies, summer cookout and holiday luncheon.
- Increase human resources presence in the field by visiting employees at each of the City’s approximately 27 work sites at least twice during 2019.
- Determine and document City mission, vision, and values in coordination with the Office of the Mayor and led by a facilitator.
- Administer annual internal service department satisfaction survey to department heads and employees.
## Activity Highlight - Employee Relations

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.00</td>
<td>83,736</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>445</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>19,163</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>103,344</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Compensation and Benefits

**Activity Description:** Develop and manage compensation and benefit policies including the following: new policy development, existing policy updates, policy implementation, maintenance of policy application, financial processing, and employee consultation.

- Evaluate options and potential benefits of outsourcing Family Medical Leave Act administration.
- Develop a 3-5 year strategic wellness plan that moves from an activity-based to outcome-based approach to control the cost of rising health insurance claims.
- Promote annual physicals for employees and dependents.
  - Currently only 28% of our employees and 41% of spouses receive physicals.
2019 Budget Goals

Continued: Compensation and Benefits

- Conduct ongoing review of all employee benefits to ensure the benefits package has the best balance between cost, quality of coverage, and customer service.
- Serve on the AIM, formerly IACT, Medical Trust Board of Trustees.
- Improve online access and web-based use for benefits administration by developing automated communications between third-party benefit vendors and New World.
- Improve efficiency of the open enrollment process without compromising quality by identifying process improvements, and developing systems to move from paper-based open enrollment to online enrollment.
- Conduct annual post-open enrollment survey of employees for feedback on process improvement.
Activity Highlight - Compensation & Benefits

- Line 100 - Personnel Services includes $275,000 placeholder for possible non-union market adjustments

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.95</td>
<td>439,107</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>871</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>37,555</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>477,533</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Training and Development

**Activity Description:** Develop and evaluate both individual employees and the organization as a whole including the following: employee supervisory training, performance evaluation, and process analysis and improvement.

- Work with Community and Family Resources Department to expand and enhance diversity and inclusiveness training for all 700 employees.
- Develop supervisor training program, over a 3-year period.
- Create a library of materials and books for supervisors to assist in improving their skills.
- Organize bi-monthly supervisor journal clubs by year-end to further promote supervisor development.
- Target areas for development as identified in quarterly performance reviews to improve leadership skills of senior management.
- Conduct focus groups and work with departments to identify training resources.
## Activity Highlight - Training and Development

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>0.62</td>
<td>52,178</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>277</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>11,941</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>64,395</strong></td>
</tr>
</tbody>
</table>
Human Resources – Budget Highlights

Category 1 – Personnel Services - $939,725
This category has a requested a decrease of $25,425.

- 2% salary increase for HR staff
- $275,000 possible market based salary adjustments for non-union employees
- $25,425 decrease from 2018

Category 2 – Supplies - $2,860
This category has no change from 2018.
Human Resources – Budget Highlights

Category 3 – Other Services - $123,258
This category has a requested increase of $41,025.

- **Line 323 – Travel**: Increases by $1,575 for travel costs to send a staff member to the Society of Human Resources Management (SHRM) Diversity and Inclusion Conference
- **Line 340 – Hardware and Software Maintenance**: Decreases by $2,000 after a 2018 one-time $2,000 purchase of a laptop and docking station for the assistant director.
- **Line 399 – Other Services/Charges**: Decreases by $37,500 and includes a $3,000 decrease for diversity training for all employees; a $70,000 decrease for year 2 of a 3-year organizational assessment for all departments; and a $35,000 increase for outsourcing the administration of the Family Medical Leave Act (FMLA)

Category 4 – Capital Outlays - $0
## Human Resources – Budget Summary

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>2017 Actual</th>
<th>2018 Budget</th>
<th>2019 Budget</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>479,580</td>
<td>797,957</td>
<td>813,607</td>
<td>15,650</td>
<td>2%</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td>1,884</td>
<td>2,860</td>
<td>2,860</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td>106,714</td>
<td>164,333</td>
<td>123,258</td>
<td>(41,075)</td>
<td>-25%</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>588,178</td>
<td>965,150</td>
<td>939,725</td>
<td>(25,425)</td>
<td>-3%</td>
</tr>
</tbody>
</table>
Human Resources – Conclusion

The 2019 Human Resources’ budget request reflects increases that align with the stated goals of creating a positive, productive and inclusive work environment that attracts, retains, and develops talent in order to accomplish organizational goals.

Thank you for your consideration of the Human Resources Department’s 2019 budget request.

I would be happy to answer any questions.
City of Bloomington, IN
Office of the City Clerk
Budget Presentation, FY 2019
Why We Exist

The Office of the City Clerk is defined both in statute and in practice. It sits outside the City Administration and beside that of the Common Council, both literally and statutorily.
2018 Budget Goals Update

- Increased Clerk staffing for Council business
- Increased availability of all Council records
- Collaboration with other city departments in digitization, cataloguing, and archiving records
Our Year to Date. . .

Parking Tickets Appealed: 2,112
Wedding Ceremonies: 42
Fire Department Historical Records
Inventoried: 2480
Meetings Attended: 50, for a total of 4,030 minutes
Minutes/Memos Produced: 260 pages
Meals Packed for Charity: over 10,000
(Clearly not alone!)
2019 Budget Goals

Activity: Statutory

- The office will continue to provide staff for Council committees and meetings.
- Post meeting memos within 24 hours.
- The Clerk’s office will produce memos and/or minutes for all of those meetings for approval or review at the next available meeting.
## Activity Highlight - Statutory

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.00</td>
<td>58,222</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>1,400</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>9,330</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>68,952</td>
</tr>
</tbody>
</table>
2019 Budget Goals

Activity: Legislative

● The Clerk’s office will update the BMC quarterly.

● The Clerk’s office will update the master legislative index going back at least another 20 years.
### Activity Highlight - Legislative

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.00</td>
<td>58,222</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>1,400</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>9,330</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>68,952</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Activity: Community Relations and Services

- The Clerk’s office staff will continue attending classes and trainings in order to achieve certification.
- Expand online availability of all records to maximize accessibility.
- Participate in panels and tours related to the City of Bloomington and City Hall.
## Activity Highlight - Community Relations

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.00</td>
<td>58,222</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>1,400</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>9,330</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>68,952</td>
</tr>
</tbody>
</table>
2019 Budget Goals

Activity: Parking Ticket Appeals

- Respond to parking ticket appeals within three weeks during high-volume times.
- Respond to parking ticket appeals within one week the rest of the year.
- Provide ongoing education to members of the public regarding parking regulations.
# Activity Highlight - Parking Ticket Appeals

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.00</td>
<td>58,222</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>1,400</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>9,330</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>68,952</td>
</tr>
</tbody>
</table>
Office of the City Clerk – Budget Highlights

Category 1 – Personnel Services - $232,890
This category has a requested increase of $4,740.

Category 2 – Supplies - $5,600
This category has a requested decrease of $5.
Office of the City Clerk – Budget Highlights

Category 3 – Other Services - $37,320
This category has a requested decrease of $730.

1. Line 316 (Instruction): Increases by $670 for continuing education
2. Line 317 (Mgt. Fee, Consultants, and Workshops): Decreases by $500 for workshops shifted to instruction
3. Line 323 (Travel): Increases by $600 for travel costs related to training
4. Line 399 (Other Services and Charges): Decrease by $1500 for Bicentennial expenses

Category 4 - Capital Outlays - $0
# Office of the City Clerk – Budget Summary

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>2017 Actual</th>
<th>2018 Budget</th>
<th>2019 Budget</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>205,470</td>
<td>228,149</td>
<td>232,890</td>
<td>4,740</td>
<td>2%</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td>16,077</td>
<td>5,605</td>
<td>5,600</td>
<td>(5)</td>
<td>0%</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td>5,673</td>
<td>38,050</td>
<td>37,320</td>
<td>(730)</td>
<td>-2%</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>227,221</td>
<td>271,804</td>
<td>275,810</td>
<td>4,005</td>
<td>1%</td>
</tr>
</tbody>
</table>
Office of the City Clerk—Conclusion

The 2019 Office of the City Clerk’s budget request reflects increases that align with our stated goals.

Thank you for your consideration of the Office of the City Clerk’s 2019 budget request.

I would be happy to answer any questions.
Why We Exist

The Legal Department serves the City’s legal needs, which range from code drafting and enforcement, to solving citizens’ issues, real estate and tax issues, statutory interpretation, risk, human rights, litigation, and general advice to the Mayor and City Departments on a broad variety of municipal, state and federal law issues. The Legal Department saves the City the costs of outside counsel for all but the most complex or specialized matters, assuring that the City obtains the legal assistance it needs to minimize risk for the city and its residents and achieve its goals.
Background

- The Department
  - 11 FTE employees and 1 part-time employee
  - 3 Divisions: Legal, Human Rights and Risk
- Major Accomplishments
  - As of July 9, 2018, Risk had held 81 training sessions and conducted 182 safety audits—an average of 13.5 trainings per month and 6.7 audits per week. 2018 goal is 8 trainings per month and 5 audits per week.
  - As of August 1, 445 contracts entered into Contract Central database.
  - Negotiated agreement for purchase of clean site at current hospital location. Due diligence in process.
  - A total of 350 bankers’ boxes of documents beyond their retention periods were reviewed and shredded in April.
  - On May 4, closed on a land swap with Solution Tree to obtain parcels necessary for the Trades District infrastructure. Revised plat was recorded.
2018 Budget Goal Update

Legal Counsel

✔ Assist as needed with Trades District infrastructure project.
✔ Assist as needed with Dimension Mill project.
✔ Handle transactions related to Switchyard Park.
✔ Provide legal assistance related to purchasing and repurposing current IU Health/Bloomington Hospital site.
➢ Assist with legal aspects of establishing a citywide high-speed broadband network.
➢ Assist in collaborating with the County on new Convention Center and hotel.
➢ With management team, successfully negotiate new labor contracts for Police and AFSCME.
2018 Budget Goal Update

Legal and Policy Documents

✔ Continue process developed in 2017 for continually updating Contract Central with new contracts.
➢ Provide and maintain digital access to all city contracts.
➢ Determine necessary updates to Title XV and assist P&T with amendments.
➢ Assist in shepherding Title XV updates through Traffic Commission and Council process.
➢ Assist P&T UDO update to reflect new comprehensive plan.
2018 Budget Goal Update

Litigation

IFI lawsuit:
✔ Monitor Masterpiece Cakes case at the US Supreme Court, and assess appropriate next steps after decision.

COB v. Holcomb:
✔ Wait for appellate court ruling on request for interlocutory appeal by the state and then determine next actions.
  ● Court ruled in City’s favor on January 8.
✔ Agree with State on deadline for State’s answer to our complaint.
✔ Review records and respond to discovery requests.
➢ Draft and file summary judgment motion.
➢ Depositions of City personnel.
➢ Pursue appeals, as necessary.
2018 Budget Goal Update

Department Management
✔ With Human Resources, develop client satisfaction survey.
✔ Administer client satisfaction survey.
➢ Review results of survey and take corrective action, as needed.

Human Rights
✔ Take appropriate steps in response to 2017 HUD letter.
✔ Seek and obtain positive audit response letter from HUD.
2018 Budget Goal Update

Risk Management

✔ Ensure ongoing process for proper destruction of legal documents.
➢ Provide training sessions throughout the year and track numbers and attendees. Measurable outcomes of an average of 8 trainings/month and 5 audits/week.
➢ Continue working with ITS and Controller to implement system-wide records management system.
➢ Review our use of electronic records and begin process for properly "destroying" electronic records.
2019 Activity Descriptions

Legal Counsel

**Activity Description:** Provide legal research, legal interpretation and information, and provision of general legal advice on all aspects of City business to the Mayor’s Office, City Departments, and Boards and Commissions. Improve provision of legal services based on City department responses to internal customer service survey.

- Provide sound advice on all legal aspects of establishing a citywide high-speed broadband network.
- Negotiate and draft all necessary contracts and other legal documents pertaining to the development of the Trades District.
- Handle negotiation and documentation of real estate and other transactions for the development of Switchyard Park, including with the Redevelopment Commission.
- Collaborate with the County to fund and construct new Convention Center and hotel.
- Provide legal assistance with any transactions, negotiations, due diligence or other legal aspects of purchasing and redeveloping the current IU Health-Bloomington Hospital site.
Continued: Legal Counsel

- Assist with legal advice and documents related to City’s obligation to provide utilities, the transfer of Range Road to the City, and any road work to extend Range Road across campus for the new IU Health Regional Academic Health Center.
- Provide timely, efficient, thorough and professional legal advice to other city departments related to the above projects and others.
- Administer second client satisfaction survey through Human Resources. Assess whether steps taken after the first survey have been effective and whether department performance has improved, remained static or declined.
### Activity Highlight: Legal Counsel

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>2.34</td>
<td>198,620</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>4,928</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>74,683</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>278,231</strong></td>
</tr>
</tbody>
</table>
2019 Activity Descriptions

Legal and Policy Documents

**Activity Description:** Draft, review, edit and revise legal and City policy documents related to all aspects of City business, including but not limited to ordinances, agreements and contracts, leases, deeds, legal memos, briefs and court filings, official City policies and correspondence.

- Document City’s activities as required in an efficient, legally sound and professional manner.
- Increase employee and public access to database of contracts in force.
  - Investigate vendor options with ITS and Controller.
  - Implement new software for digitizing workflows and files.
- Make the process of public records requests more accessible.
  - Evaluate adding responses to City website.
- Update the Municipal Code, to include updating UDO and other code sections, such as parking, transportation plan, and possible substance use disorder provisions.
## Activity Highlight - Legal and Policy Documents

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>4.99</td>
<td>423,554</td>
</tr>
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<td>200 - Supplies</td>
<td></td>
<td>9,856</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>74,683</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>508,093</strong></td>
</tr>
</tbody>
</table>
2019 Activity Descriptions

Litigation

**Activity Description:** Achieve best legal results possible for the City when it is sued or when the City must initiate legal action.

- Litigate suits brought against or by the City, and supervise outside counsel and insurance counsel handling litigation on the City’s behalf.
- Provide litigation support for routine enforcement, tort and employment matters.
- Provide litigation support for major ongoing or anticipated matters include IFI, the annexation lawsuit against the State of Indiana, and opioid litigation.
- Aim for efficient conclusion of suits via negotiation, settlement or court order, within one year for routine and/or less complicated matters.
## Activity Highlight - Litigation

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>0.95</td>
<td>80,636</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>3,080</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>29,873</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>113,590</strong></td>
</tr>
</tbody>
</table>
Human Rights

Activity Description: Ensure that the City is compliant with Civil Rights laws and regulations that protect our residents. Maintain the highest ethics in conducting City business.

- Enforce and advise on the City’s Human Rights Ordinance, ensuring the City complies with federal civil rights laws, including Title VII of the Civil Rights Act and the Americans with Disabilities Act.
- Advise City staff on ethics matters.
- Conduct thorough and fair investigations for Human Rights and Human Resources.
- Assist Human Resources in revising the City’s Personnel Manual.
## Activity Highlight - Human Rights

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.33</td>
<td>112,976</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>1,848</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>7,468</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>122,292</strong></td>
</tr>
</tbody>
</table>
2019 Activity Descriptions

Risk Management

**Activity Description:** Reduce the City’s financial and physical risks as much as possible through responsible stewardship of insurance, provision of training, implementation of prevention measures, and providing professional assistance when incidents occur.

- Provide training on risk prevention, with an average of four risk training sessions per month and an average of five safety audits per week.
- Investigate and manage incidents to prevent future incidents and control workers’ compensation and insurance costs.
  - Evaluate options for managing administration of workers’ compensation.
  - Reduce injuries needing OSHA recording by 10%.
  - Reduce workers’ compensation costs by 10%.
2019 Activity Descriptions

Continued: Risk Management

● Provide direction on all issues related to City insurance, including acquisition, policy compliance, reviews and renewals.
  ○ Reduce insurance claims by 5% (internal denials and management) in order to reduce the premium modifier.
● Advise and assist with incident reporting and management.
● Manage risk related to City documents by implementing records retention and destruction procedures and processes.
  ○ Evaluate processes for proper destruction of electronic legal documents.
  ○ Collaborate with ITS to implement systematic records management and work flow processes citywide using New World or other new software, as required.
● Manage the City’s risk profile.
## Activity Highlight - Risk Management

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>3.39</td>
<td>287,660</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>41,887</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>560,123</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>889,671</td>
</tr>
</tbody>
</table>
Legal Department – Budget Highlights

The Legal Department’s overall budget request is $1,911,877. This is an increase of $85,598.

**Category 1 – Personnel - $1,103,477**
This category has requested an increase of $32,356. As you are aware, the city is requesting a 2% salary increase for non-union staff.

**Category 2 – Supplies - $61,599**
This category has requested an increase of $429.
Category 3 – Other Services & Charges - $746,831
This category has requested an increase of $52,813.

- **Line 313 - Medical**: request is $6,500, which is an increase from zero. We agreed with AFSCME that the City will pay up to $100 per individual for physicals required for Commercial Drivers’ Licenses (CDLs). So far in 2018 we have covered these, along with motor vehicle record checks for CDLs, from line 399 (Other Services and Charges), but we believe they are more appropriately accounted for in the medical line.

- **Line 342 - Worker’s Comp & Risk**: request is $495,000, which is an increase of $45,000. This reflects the anticipated increase in costs associated with workers’ compensation.

- **Line 391 - Dues and Subscriptions**: request is $19,482, an increase of $1,613, which is due to the City entering into a new contract for electronic Westlaw services beginning January 2019 and covering the next few years.

Category 4 - Capital Outlays - $0
## Legal – Budget Summary

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>2017 Actual</th>
<th>2018 Budget</th>
<th>2019 Budget</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>999,740</td>
<td>1,071,091</td>
<td>1,103,447</td>
<td>32,356</td>
<td>3%</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td>58,293</td>
<td>61,170</td>
<td>61,599</td>
<td>429</td>
<td>1%</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td>634,589</td>
<td>694,018</td>
<td>746,831</td>
<td>52,813</td>
<td>8%</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,692,622</strong></td>
<td><strong>1,826,279</strong></td>
<td><strong>1,911,877</strong></td>
<td><strong>85,598</strong></td>
<td><strong>5%</strong></td>
</tr>
</tbody>
</table>
Legal – Conclusion

The 2019 Legal Department’s budget request reflects increases that align with the department’s stated goals of assuring that the City obtains the legal assistance it needs to minimize risk for the City and its residents and achieve its goals.

Thank you for your consideration of the Legal Department’s 2019 budget request.

I would be happy to answer any questions.
Why We Exist

The mission of Information & Technology Services (ITS) is to provide — through the forward-looking application of information technology — IT services, tools, training and resources necessary to maintain mission-critical City systems; empower City staff to excel in their work; and electronically engage residents of our community in their own governance.
Background

- **Department**
  - Technology Support: 6 employees
  - Geographic Information Systems (GIS): 3 employees
  - Systems & Applications: 7 employees
  - Administration: 3 employees

- **Major accomplishments**
  - Tech Support: over 2000 support tickets addressed, 4.9/5 customer service survey average.
  - GIS: Geodatabase transition underway, first phase of US Census preparation completed.
  - Systems: Disk-based backup deployed, Zabbix system/network monitoring installed.
2018 Budget Goals Update

Administration
➢ Fiber initiative: Secure gigabit fiber connectivity for Bloomington residents
   ● RFI process continuing. Discussions continue with respondents.
➢ ITS 3-5 year strategic plan
   ● Project starting after organizational review completed.
➢ ITS comprehensive internal survey
   ● Survey instrument nearly completed.
2018 Budget Goals Update

Technology Support
✔ Customer Support 4.5 out of 5. Monitor at bloomington.in.gov/performance/
  • 4.89 average for past year to date
  • 4.93 average for past month to date

➢ Purchase and replace aging desktops, laptops, printers and peripherals - our capital replacement cycle is underway and on schedule for completion by the end of 2018.

➢ Dell image assist is streamlining computer configuration and deployment.
2018 Budget Goals Update

Geographic Information Systems

✔ LUCA Local Update of Census Addresses program and preparation/planning for 2020 Census.

➢ Enterprise geodatabase migration is ongoing in 2018.

➢ Update My Bloomington tool on website with historic district information.

➢ Website web maps improvements: interface, legends, Master Address integration.
2018 Budget Goals Update

Systems & Applications

✔ Disk-based backup deployed and operational.

➢ Ensure systems are highly available, redundant and secure: 99.999% uptime for core servers and services.
  • 2018 to-date uptime is 99.54% for 6 virtual servers. This reflects downtime for updates to individual servers while the service itself has been 100% available.

➢ Provide network design support for Switchyard Park, Animal Shelter, Trades District, Mill projects.
2019 Budget Goals

Administration

**Activity Description:** Innovate, plan and administer the information and communication technology function of City government. Maintain and operate its office in keeping with City policy. Support governance bodies that inform ITS and City operations. Mobilize internal and external resources (consulting, contingency funds, emergency services) as necessary to support ITS goals.

- Support initiative to secure affordable gigabit-class internet connectivity for all Bloomington residents.
- Implement 3-5 year strategic plan for ITS department.
- Implement community digital equity/inclusion strategic plan.
- Develop data center site strategic plan/capital plan.
- Update IT Policy Manual.
- Support and integrate incoming ITS Staff (Office Manager).
## Activity Highlight - Administration

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>2.93</td>
<td>272,361</td>
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<tr>
<td>200 - Supplies</td>
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<td>16,905</td>
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<tr>
<td>300 - Other Services</td>
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<td>170,114</td>
</tr>
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<td>400 - Capital Outlays</td>
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<td>2,677</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>462,057</td>
</tr>
</tbody>
</table>
2019 Budget Goals

Program Evaluation & Project Management

**Activity Description:** Manage large and small projects and programs (continuing initiatives with several interrelated projects) to improve ITS and City performance. Evaluate needs of users, determine gaps in services, research and propose solutions.

- Coordinate project management for gigabit fiber optic partnership.
- Coordinate project management for Community Development enterprise software deployment.
- Coordinate project management for IT Infrastructure Initiative.
- Effectively manage broad portfolio of IT projects.
- Expand IT project management capacity through training and partnerships.
## Activity Highlight - Program Evaluation/Project Management

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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<td>0</td>
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<tr>
<td>300 - Other Services</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>132,279</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Information, Data & Media Services

**Activity Description:** Facilitate the exchange of information and ideas between the City and community at large. Produce, assemble, and share government information, data and media with the public and internal customers through a variety of channels including the City’s website, GIS, data portal, performance dashboard, and other digital and broadcast services.

- Maintain excellent City government website (including 2,648 pages) and data portal. Assess trends via the 2019 community survey, when compared against the 2017 survey, regarding those who see the website as excellent/good quality.
- Publish 200 datasets (currently at 142), including 50 geospatial datasets (currently 25), into the City’s B-Clear Open Data Portal by end of 2019.
- Manage city unmanned aerial vehicle UAV program to effectively capture useful data, imagery and media to improve City operations.
- Update website homepage, navigation, My Bloomington tool and interactive maps.
- Complete GIS modernization and provide geospatial support for 2020 Census activities.
# Activity Highlight - Information/Data/Media Services

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>4.02</td>
<td>372,963</td>
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<td>2,624</td>
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<tr>
<td>300 - Other Services</td>
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<td>482,511</td>
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<tr>
<td>400 - Capital Outlays</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>858,098</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Enterprise Software and Systems Integration

**Activity Description:** Support, integrate and maintain software applications and database systems for individual, group, departmental and enterprise-scale use, including commercial, open source, free and internally-developed software for local and cloud environments.

- Maintain 4.5 out of 5 service rating on internal customer service surveys.
- Deploy Community Development Management System to improve Planning & Transportation and HAND operations.
- Assist with expansion of Lucity asset management system for Public Works.
- Develop 3 new system integrations to automate data publishing from enterprise applications into the data portal.
### Activity Highlight - Enterprise Software/Systems Integration

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>2.70</td>
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<td>200 - Supplies</td>
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<tr>
<td>300 - Other Services</td>
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<td>87,900</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>338,709</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

End-User Services & Technology Support

**Activity Description**: Provide the support, training and tools needed to ensure City staff can productively use City IT systems to achieve their goals.

- Maintain 4.5 out of 5 service rating on internal customer service surveys.
- Organize and execute the annual capital replacement of one fourth of City desktop inventory: 84 PCs, 30 laptops, 73 monitors, 105 UPS units, 16 printers and peripherals. (Utilities not included)
- Conduct annual internal survey on IT training needs to guide training strategy.
- Ensure functional and up-to-date City Knowledge Base (KB) content and system.
- Implement identified account creation/termination process improvements.
## Activity Highlight - End-User Services/Tech Support

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>5.60</td>
<td>520,476</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>12,282</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>43,221</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>151,234</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>727,213</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Information Systems Infrastructure

**Activity Description:** Support physical and virtual information and communication infrastructure providing storage, computer, backup, network and phone services, as well as facilities-based systems such as video control rooms, meeting rooms, projectors, security cameras, and door access systems.

- Ensure systems are highly available, redundant and secure with 99.999% uptime for core servers and services.
- Ensure network and internet downtime is minimal with 99.999% uptime.
- Support successful deployment of Infrastructure Initiative systems.
- Evaluate/engineer fiber network to ensure redundancy and support for Infrastructure Initiative.
## Activity Highlight - Information Systems Infrastructure

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.36</td>
<td>126,334</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>10,392</td>
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<tr>
<td>300 - Other Services</td>
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<td>309,983</td>
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<tr>
<td>400 - Capital Outlays</td>
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<td>259,640</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>706,350</strong></td>
</tr>
</tbody>
</table>
ITS – Budget Highlights

Sources of ITS Funding
ITS operations receive funding from the following sources:

- ITS General Fund
- Telecommunications Non Reverting Fund (Telecom Infrastructure & Telecom Services Accounts)
- Electronic Map Generation Fund (custom map production)
- Enhanced Access Fund (custom data requests) (unappropriated)

We are budgeting from the first three funds in this proposal.
ITS – Budget Highlights

General Fund ITS

Category 1 – Personal Services - $1,672,064
This category has a requested increase of $49,814.

- Increase of $49,814 for a 2% increase for non-union staff, adding an Office Manager and moving the Digital Communications Specialist position out of the ITS budget.

Category 2 – Supplies - $32,304
This category has a requested increase of $2,034.

- Line 242 (Other Supplies): Increase of $2,000 for equipment and supplies to support proposed Office Manager’s role.
ITS – Budget Highlights

General Fund ITS

Category 3 – Other Services and Charges - $461,206

This category has a requested increase of $37,260.

- **Line 364 (Hardware and Software Maintenance):** Increase of $14,900 for maintenance for critical hardware and software systems (new firewall support, enterprise password management tool, card access support, etc.)
- **Line 391 (Dues & Subscriptions):** Increase of $22,360 for subscriptions, memberships, software subscriptions, domain registrations. Includes additional Firewall support subscriptions, PIR/Discovery software, Google Enterprise licenses, and Trello project tracking.
ITS – Budget Highlights

Telecommunications Non-Reverting Fund - Infrastructure Account
Category 3 – Other Services and Charges - $107,800
This category has a requested decrease of $20,000.

- Line 364 (Hardware and Software Maintenance): Decrease of $20,000 due to Infrastructure Initiative. Network hardware maintenance is covered elsewhere.
ITS – Budget Highlights

Telecommunications Non-Reverting Fund - Infrastructure Account
Category 4 – Capital Outlays - $363,551
This category has a requested increase of $106,551.

- **Line 442 – Purchase of Equipment:** Increase of $120,551 for Infrastructure Initiative including funding for data center (storage, computer, disaster recovery), wired and wireless network hardware refresh.
- **Line 445 – Equipment:** Decrease of $14,000 due to reduction in funding for stand-alone servers due to Infrastructure Initiative. Public safety capital replacement for BFD and BPD PCs/Laptops and MDTs will continue from the Public Safety LIT funds.
ITS – Budget Highlights

Telecommunications Non-Reverting Fund - Services Account

Category 3 – Other Services and Charges - $524,882

This category has a requested increase of $4,380.

- **Line 398 – Community Access TV/Radio:** Increase of $4,380 for a 1% increase to CATS, Community Access Television Services. CATS funding amounts to nearly half of the City’s annual Telecom fund revenue. Overall revenue in this fund revenue decreased in 2017 by 4.87% (2018 revenue will not be known until 1Q 2019). To help sustain the Telecom Fund, this modest increase is proposed.
 ITS – Budget Highlights

Electronic Map Generation Fund
Category 3 – Other Services - $3,000
This category has a requested increase of $3,000.

- Line 398 – Mgt. Fee, Consultants, and Workshops: Increase of $3,000 for State of Indiana aerial photography program.
## ITS – Budget Summary

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>2017 Actual</th>
<th>2018 Budget</th>
<th>2019 Budget</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1,498,758</td>
<td>1,622,250</td>
<td>1,672,064</td>
<td>49,814</td>
<td>3%</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td>23,783</td>
<td>40,170</td>
<td>42,204</td>
<td>2,034</td>
<td>5%</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td>763,842</td>
<td>1,072,248</td>
<td>1,096,888</td>
<td>24,640</td>
<td>2%</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td>190,963</td>
<td>309,000</td>
<td>413,551</td>
<td>104,551</td>
<td>34%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>2,477,346</td>
<td>3,043,668</td>
<td>3,224,707</td>
<td>181,039</td>
<td>6%</td>
</tr>
</tbody>
</table>
ITS – Conclusion

The 2019 Information & Technology Services budget request reflects increases that align with the stated goals to provide for the information and communications technology needs of the City.

Thank you for your consideration of the ITS 2019 budget request.

I would be happy to answer any questions.
Why We Exist

Legislative Body of the City
The Common Council is the legislative body of the City and exercises or performs “all powers and duties of a city that are legislative in nature” and “may manage the finances of the city to the extent that that power is not vested in the executive branch.” I.C. § 36-4-4-4

Working in concert with elected officials, departmental staff, and members of the public, the Council strives to perform its duties in an open, accountable, effective, and deliberative manner.
The Council is:

- Composed of nine members, with three representing the City at-large and six representing distinct geographic districts.
- Staffed by 2.63 FTEs and a SPEA Corps Fellow.

Note on Changes Due to Program or Activity-Based Budgeting

- Program or Activity-Based Budgeting has been embraced because it better presents the true costs of activities, services, or programs. However, in the first year of this approach, it exaggerates increases in the Council Budget.
- Please keep in mind that the:
  - increase in the General Fund allocation for the Council Office over last year is 4.47%.
  - Jack Hopkins Social Services Program Fund and Alternative Transportation Fund are new to the Council Budget but not new to the City and propose a total increase of $5,000 above last year.
2018 Budget Goals Update

Legislative Duties
✔ Adopted the Comprehensive Plan with 150 amendments after more than 30 hours of deliberations over five months ending in January 2018 and many additional hours in the development of amendments.
✔ Adopted Ordinances and Resolutions.
  ● 33 ordinances and 41 resolutions in 2017.
  ● 11 ordinances and 12 resolutions by the end of June 2018.
✔ Held Public Meetings.
  ● 52 meetings in 2017 (with multiple meetings being part of one long Special Session).
  ● 28 meetings by the end of June in 2018.
✔ Attendance of Councilmembers at meetings was 92% in 2017 and 90% to the end of June in 2018.
2018 Budget Goals Update

Policy Development and Coordination

✔ Established a Land Use Committee (Res 17-01) which began work in the spring of 2018.

✔ Jack Hopkins Social Services Program Funding Committee was responsible for distribution of $312,874 to 23 social service agencies.

✔ Council Sidewalk Committee, in consultation with City staff from several departments, was responsible for use of $312,000 from the Alternative Transportation Fund for 3 sidewalk and 2 pedestrian crossings/traffic calming projects. Almost all funding went to latter phases of previously-funded projects.

✔ Facilitated work of the Public Safety Local Income Tax (LIT) Committee of the Monroe County (LIT) Council in the summers of 2017 and 2018.

➢ Affordable Living Committee is wrapping up its report.
2018 Budget Goals Update

Constituent Services and Community Relations

✔ Council increased the capability to provide constituent services for the Council members and Council as a whole.

➢ Continue to grow the ability to provide more and improved constituent services for Council members.
2018 Budget Goals Update

Legal Counsel
✔ Attorneys conducted legal research on matters of concern to Council members, reviewed legislation, addressed emerging legal questions, and advised the Council and Council members as needed on matters related to Council business.

➢ Hired part-time staff to help with administrative and constituent services.
2018 Budget Goals Update

Administrative Services

✔ Added part-time staff to provide more administrative support for both individual Council members and for the Council Office as a whole.
✔ Continued to establish efficiencies for performance of regular, recurring tasks.

➢ Increase workflow/project management.
2019 Budget Goals

Legislative Duties

**Activity Description:** Taking formal actions at meetings with a majority vote of the membership. These actions may include: “pass(ing) ordinances, orders, resolutions and motions for the government of the city, the control of the city’s property and finances, and the appropriation of money.” I.C.§ 36-4-6-18

In performing these duties, the Council strives to adopt legislation and other actions in an open, informed, civil, and timely manner that are lawful, effectively address needs, and reflect the values of the City.

- Create greater efficiencies in scheduling legislation.
- Increase public awareness of Council meetings, meeting materials and notices.
- Increase accessibility at meetings for the hearing-impaired.
- Increase attendance at Regular Sessions, Special Sessions, and Committees of the Whole.
Activity Highlight - Legislative Duties

- Cat 100 - Legislative duties account for approximately ⅓ of Council and Council Staff time
- Cat 300 - Includes providing American Sign Language at Regular and Special Sessions after the Summer Recess in 2019

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>2.32</td>
<td>183,076</td>
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<tr>
<td>200 - Supplies</td>
<td></td>
<td>525</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>61,618</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>245,219</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Policy Development and Coordination

**Activity Description:** Develop and coordinate policies in collaboration with the Administration and public that address community needs effectively while remaining within budgetary constraints:

- **How** - Council members pursue individual initiatives, work in informal groups (sometimes with others), participate in 6 Standing Committees, and create Special \((ad \ hoc)\) Committees.
- **Staff Support** - Staff facilitate the work of committees, research policy both in terms of its legality and best practices, and draft memoranda, reports, legislation, and other policy documents.
- **Advisory Bodies** - Council appoints persons to serve on advisory bodies (which is facilitated by the Office of City Clerk), serve on those bodies, and follow their activities.
- **Continue to explore ways to improve the effectiveness and efficiency of Council committees**
Activity Highlight - Policy Development and Coordination

- 100 - Policy Development accounts for approximately \( \frac{1}{3} \) of Council member and staff time
- 300 - includes grant for operation of the Buskirk-Chumley Theatre ($52,500) and now includes much of the Jack Hopkins Social Services Program Fund monies (previously located in the HAND department)
- 400 - now includes Alternative Transportation Fund monies for sidewalk and traffic-calming projects (previously located in Planning & Transportation department)
- Total comprises approximately 62% of Council Office Program Budget

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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<td>181,498</td>
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<tr>
<td>200 - Supplies</td>
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<td>525</td>
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<td>300 - Other Services</td>
<td></td>
<td>278,734</td>
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<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>312,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>772,757</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Constituent Services and Community Relations

Activity Description: The Council and staff receive and respond to citizen contact about City policies, practices, and general issues of community concern. In doing so, the Office strives to provide open, responsive and accountable municipal government that contributes to a sense of community.

- Continue to grow the ability of the Office to provide both increased and ever-improving constituent services for Council members and the public.
Activity Highlight - Constituent Services

- 100 - Constituent Services accounts for approximately 1/5 Council and staff time.

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
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<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.40</td>
<td>110,477</td>
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<td>306</td>
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<tr>
<td>300 - Other Services</td>
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<td>9,723</td>
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<td>400 - Capital Outlays</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>120,506</strong></td>
</tr>
</tbody>
</table>
Legal Counsel

Activity Description: The Council Office includes attorneys who represent the Council on terms the Council, as a body, considers appropriate (per IC § 36-4-6-24)) and which is consistent with the obligations that attorneys have to their clients. These duties include:

- understanding and conveying the powers, duties and potential liabilities of the Council
- advising the Council on matters of law related to Council business
- ensuring Council compliance with the law
- advocating on behalf of the Council
- respecting confidentiality and exhibiting loyalty

- To provide timely, thorough, and professional services to the Council and to ensure that activities are performed in conformance with the law.
- Continue to shift administrative duties to part-time staff in order for attorneys to focus more on legal duties.
- Participate in more online seminars and webinars.
## Activity Highlight - Legal Counsel

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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<td>47,347</td>
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<tr>
<td>300 - Other Services</td>
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<td>19,447</td>
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<td>400 - Capital Outlays</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>69,639</strong></td>
</tr>
</tbody>
</table>

- 200 - includes keeping current copy of annotated laws
- 300 -
  - includes the cost of online legal research database, training & law fees;
  - but, as seen elsewhere, exaggerates the cost of Legal Counsel in this category (which will be corrected next year by creating a separate activity/program for “grants”)
2019 Budget Goals

Administrative Services

**Activity Description:** Managing meetings, projects, the webpage, internal communications, along with the ordering of supplies, equipment, and services. Also, preparing and managing the Council Office budget and performing supervisory functions.

In doing so, the Office strives to provide efficient and effective administrative support for Council members and the Council as a whole.

- Explore and improve opportunities for Council member training
- Update website for consistency, clarity, and accessibility.
- Reduce paper consumption
Activity Highlight - Administrative Services

- 100 - Administrative Services accounts for about 1/20 of Council Office time
  - Includes increase in hours of Part-Time Assistant Administrator/Legal Research Assistant to assume some of these duties

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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<td>200 - Supplies</td>
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<td>175</td>
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<td>300 - Other Services</td>
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<td>3,241</td>
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<td>400 - Capital Outlays</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>33,403</strong></td>
</tr>
</tbody>
</table>
Council Office – Budget Highlights

Category 1 – Personnel - $552,384
This category has a requested increase of $20,757 or 4%.

Compensation for the Council members and staff generally align with City policies and practices that apply to non-union City employees, which were explained, in the course of Departmental Budget Hearings, by the Human Resources department. For 2019, in addition to a 2% cost of living adjustment, there may be adjustments for some grades based upon the recommendations of the City Salary Study reported in mid-2018.

- **Line 111 (Salaries and Wages - Regular):**
  - **Council Members** - despite Salary Study showing lower than comparable pay, Council and Mayor will await considering an increase until the new term (FY 2020) - compensation in 2019 - $16,127 (2%)
  - **Council President and Vice President** - additional compensation to reflect additional duties – which is common around the state ($1,000 for President and $800 for Vice President)
  - **Council Office Staff** - increase of 2% (and possible further increases due to recommendations of Salary Study)
    - Increase of hours for Part Time Assistant Administrator/Legal Research Assistant from 20 hours (with a mid-2018 adjustment to 22 hours) to 25 hours per week in 2019 (increase of 27.5%)
Council Office – Budget Highlights

Category 2 – Supplies - $4,378
This category has a requested increase of $105 or 2.4%.

- **Line 241 (Books):** Increased cost of keeping hard copies of the annotated State statutes and constitution current by $105 (to $2,928). City Legal negotiates these services with the Council Office benefiting from their better bargaining position. This line also includes $200 for the purchase of other books as well.
Council Office – Budget Highlights

Category 3 – Other Services and Charges - $372,763
This category has a requested increase of $310,845 or 502%.

General Fund

- **Line 391 (Dues and Subscriptions):** Increases by $445 (to $4,165) for online legal research.
- **Line 396 (Grants):** Increases by $2,500 (to $52,500) for the operation of the Buskirk-Chumley Theater, the first increase in this item since it was included in the Council Office budget 3 years ago.
- **Line 399 (Other Services and Charges):** The Council wishes to provide more services for the hearing impaired at its meetings and, therefore, includes $2,900 to provide hand sign interpretation at Regular and Special Sessions after the 2019 Summer Recess.

Jack Hopkins Social Services Program Fund

- **Line 396 (Grants):** Transfers the Jack Hopkins grants from the HAND budget to the Council budget and increases the amount by $5,000 (to $305,000).
Council Office – Budget Highlights

Category 4 – Capital - $312,000

This request allocates $312,000 in Alternative Transportation Fund monies for sidewalks and traffic-calming projects. It is a continuation of a long-standing Council program. This is the same amount as 2018, but in previous years, the money for the Council Sidewalk Committee was in the Planning & Transportation department.

Alternative Transportation Fund:
* Line 431 (Improvements other than buildings) - $312,000
## Council Office – Budget Summary

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>2017 Actual</th>
<th>2018 Budget</th>
<th>2019 Budget</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>497,147</td>
<td>531,626</td>
<td>552,384</td>
<td>20,757</td>
<td>4%</td>
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<tr>
<td>200 - Supplies</td>
<td>6,528</td>
<td>4,273</td>
<td>4,378</td>
<td>105</td>
<td>2%</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td>55,753</td>
<td>61,918</td>
<td>372,763</td>
<td>310,845</td>
<td>502%</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td>300,000</td>
<td>312,000</td>
<td>312,000</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td>Total</td>
<td>859,427</td>
<td>909,817</td>
<td>1,241,525</td>
<td>331,707</td>
<td>36%</td>
</tr>
</tbody>
</table>
Council Office - Conclusion

This 2019 Council Office budget request is intended to further the mission of the Council to perform its duties in an open, accountable, effective, and deliberative manner.

Thank you for your consideration of the Council Office 2019 budget request.

I would be happy to answer any questions.
Why We Exist

The Indiana State Legislature in IC 36-4-9-6 established the position of Controller and its related duties. The office is an internal service department that oversees all financial transactions, procedures and protocols for the City of Bloomington’s 15 departments with additional oversight and interaction with Bloomington Transit, Bloomington Housing Authority, Redevelopment Commission, BCT Management Company, Bloomington Urban Economic Association, and Dimension Mill Inc.
Background

The Controller serves as the City’s Chief Financial Officer and the office of 11 staff is responsible for:

- Accounts Receivable/Payable/Payroll/Grants
- Annual Budget
- Internal Audit & Internal Controls

Significant initiatives with financial oversight currently in process include:

- Trades District
- Switchyard Park
- Convention Center
- Both the current and new hospital sites
2018 Budget Goals Update

Core Department Functions (Accounts Receivable, Accounts Payable, Purchasing, Payroll, Cash Management)

➢ Increase participation in Electronic Funds Transfer (EFT) payment process in order to eliminate processing paper checks.
  ● Processed over 15,000 payments in the 18 months ended 6/30/18 with over 71% by EFT.
  ● Processed over $125.3 M in payments in the same 18-month period.

➢ Process all payroll reports accurately and within the period required
  ● Processed over 48,000 paychecks in the 18 months ended 6/30/18 with over 97% processed electronically.
  ● Processed over $67.6 M in payroll in the same 18-month period.

➢ Maximize the City’s return on investment.
  ● Increased the net rate of return (interest earned less calculated fees) from 0.8% to 1.45%
2018 Budget Goals Update

Budgeting
➢ Develop revenue and expenditure estimates for use in creation of the annual budget.
➢ Process and submit the annual budget request within the period mandated by the State for approval by the Mayor, Common Council and Department of Local Government Finance.
  ● Consult with Council Administrator in Q4 to develop schedule for Council hearing, review and approval.
  ● Develop overall budget schedule by April 30.
  ● Meet with City Council in early May to review their budget priorities.
  ● Meet and provide support to Departments in the development of their programs and activities – May to July.
  ● Complete and submit budget to Council in mid-August.
  ● Participate in Council budget hearings in mid- to late-August.
  ● Obtain Council approval and submit budget to the Department of Local Government Finance within 48 hours of approval and prior to required date established by the DLGF.
2018 Budget Goals Update

Research & Special Projects

➢ Implement, as possible, the recommendations of the Fiscal Task Force.
  ● 7 completed
  ● 6 in progress
  ● 2 partially completed
  ● 1 pending

➢ Assist with activation of string of pearls projects.
  ● Activation of The Mill and Trades District
    ○ October 31: target date for opening of The Mill.
    ○ December 31: target date for substantial completion of the Trades District infrastructure and final completion by June 1, 2019.
  ● Purchase of and redevelopment of existing hospital site
    ○ Purchase agreement has been completed and first payment made.
      ■ Complete due diligence by September 1.
      ■ Assist in the redevelopment review process.
2019 Budget Goals

Accounts Payable

**Activity Description:** Manage and coordinate activities related to the processing, approval and payment of expenditures.

- Increase participation from 71% to 75% in Electronic Funds Transfer (EFT) payment process in order to eliminate processing paper checks.
### Activity Highlight - Accounts Payable

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>7.18</td>
<td>611,849</td>
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<tr>
<td>200 - Supplies</td>
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<td>6,286</td>
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<tr>
<td>300 - Other Services</td>
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<td>309,765</td>
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<td>400 - Capital Outlays</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>927,900</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Payroll

Activity Description: Manage and coordinate activities related to the processing, approval and payment of employee payroll and related expenditures such as payroll taxes, retirement contribution, and employee deductions.

- Process all personnel requests/updates (approximately 1,000 per year) accurately into the City’s payroll system.
- Process all payroll runs (26 pays) within the normal 2-week period required.
- Process all payroll reports accurately and within the period required.
# Activity Highlight - Payroll

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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<td>200 - Supplies</td>
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<td>300 - Other Services</td>
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<td>43,324</td>
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<td>400 - Capital Outlays</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>127,714</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Cash Management

**Activity Description:** Manage and coordinate activities related to management of City funds, bank accounts and treasury functions.

- Maximize City’s return on investment by increasing net rate of return from 0.8% to 1.45% through a combination of monitoring interest rates, monitoring and negotiating compensating balances with the bank, and minimizing bank transaction fees.
- Comply with all State and Federal banking/investing regulations for all (currently 8) bank accounts.
Activity Highlight - Cash Management

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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<tr>
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<td>23,828</td>
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<td>400 - Capital Outlays</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>72,885</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Purchasing

**Activity Description:** Manage and coordinate activities related to the procurement of goods, services, and capital. This includes reviewing purchasing requests, providing for adequate controls and procuring these items at the lowest and best price.

- Maximize City’s purchasing power by combining like purchases in order to achieve the lowest and best pricing for goods and services.
## Activity Highlight - Purchasing

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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</tr>
<tr>
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<td>791</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>38,991</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>116,477</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Budgeting

Activity Description: Manage and coordinate activities related to the development, presentation, submission and approval of the City’s annual budget.

- Develop revenue and expenditure estimates for use in creating the annual budget (approximately $150 million per year).
- Process and submit annual budget request within the period mandated by the State for approval by the Mayor, Common Council and Department of Local Government Finance.
  - Consult with Council Administrator in Q4 to develop schedule for Council hearing, review and approval.
  - Develop overall budget schedule by April 30.
  - Meet with City Council in early May to review their budget priorities.
  - Meet and provide support to Departments in the development of their programs and activities - May to July.
  - Complete and submit budget to Council in mid-August.
  - Participate in Council budget hearings in mid- to late-August.
  - Obtain Council approval and submit budget to the Department of Local Government Finance (DLGF) within 48 hours of approval and prior to required date established by the DLGF.
Activity Highlight - Budgeting

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>0.55</td>
<td>46,869</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>484</td>
</tr>
<tr>
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<td>23,828</td>
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<tr>
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</tr>
<tr>
<td>Total</td>
<td></td>
<td>71,180</td>
</tr>
</tbody>
</table>
2019 Budget Goals

Research and Special Projects

**Activity Description:** Manage and coordinate activities related to performing research and special projects as requested by the Administration and Department in order to assist them in meeting their goals and objectives.

- Implement, as possible, the 16 recommendations of the Fiscal Task Force; 7 are complete, 6 are in progress and 1 is pending.
- Implement program to obtain the Government Finance Officers Association’s Certificate of Achievement for Excellence in Financial Reporting.
  - Develop systems and reports necessary to collect data utilized in the application for the CAFR for use during the 2019 fiscal year.
- Assist with identifying and addressing fiscal impacts from construction of new IU Health campus.
- Monitor, report and make recommendations for uses of the Public Safety Local Income Tax.
2019 Budget Goals

Continued: Research and Special Projects

- Identify and implement possible solutions to increase efficiency and minimize subsidy for parking meters, parking structures and surface lots.
- Complete implementation of Energy Savings program projects and monitor results.
- Assist in the review and audit of savings annually.
- Assist departments with fiscal impacts and needs for their strategic programs.
- Develop and provide advice, guidance and reports as needed to meet the requirements of each project.
- Assist with activation of string of pearls projects.
  - Activate the Mill and Trades District.
    - Trades District Infrastructure and set for completion by June 1, 2019.
  - Convention Center expansion.
    - Collect and manage City’s share of the Food & Beverage tax.
    - Prepare and present requests to appropriate funds to City Council and Food & Beverage commission as needed.
  - Purchase of and redevelopment of existing hospital site; assist in the redevelopment review process.
## Activity Highlight - Research and Special Projects

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>2.22</td>
<td>189,179</td>
</tr>
<tr>
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<td></td>
<td>1,319</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>64,986</td>
</tr>
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<td>400 - Capital Outlays</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>255,483</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Internal Audit

Activity Description: Develop, implement and oversee a program designed to assess the effectiveness of internal controls, segregation of duties in order to minimize the risk of the organization to fraud, theft and misuse of City assets. In addition, assist external auditors and other consultants in their reviews and audits of the organization.

- Obtain clean audit opinion from State Board of Accounts.
- Review appropriate levels of controls and segregation of duties to minimize the risk of theft or fraudulent use of city resources.
- Review selected transactions for compliance with City, State, and Federal requirements during the calendar year. This is in addition to the annual external audit, external bi-annual internal controls review, and the prescribed internal controls and review by City staff, Controller and Corporation Counsel.
  - Conduct a minimum of 2 audits of cash funds per year (18 funds).
  - Conduct a risk based analysis and audit of revenue and expenditures.
    - Review at minimum 50% of transactions that account for 90% of total spend.
    - Review at minimum 5% of transactions that account for the remaining 10% of total spend.
## Activity Highlight - Internal Audit

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>0.90</td>
<td>51,129</td>
</tr>
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<td>200 - Supplies</td>
<td></td>
<td>308</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>15,163</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>66,600</td>
</tr>
</tbody>
</table>
Office of the Controller – Budget Highlights

The Controller’s Office general fund budget request is $1,638,240. This is an increase of $114,064.

Category 1 - Personnel - $1,107,805
This category has requested an increase of $111,364.

- This increase is related to the overall increase for non-union personnel and the addition of a Data Analyst/Manager position.

Category 2 - Supplies - $10,550
This category has requested an increase of $2,700.

- Related to new scanners for AP/AR.
Category 3 - Other Services & Charges - $519,885
This category has no change from the previous year.

Category 4 - Capital Outlays - $0
### Office of the Controller – Budget Summary

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>2017 Actual</th>
<th>2018 Budget</th>
<th>2019 Budget</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>867,626</td>
<td>996,441</td>
<td>1,107,805</td>
<td>111,364</td>
<td>11%</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td>4,202</td>
<td>7,850</td>
<td>10,550</td>
<td>2,700</td>
<td>34%</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td>634,206</td>
<td>519,885</td>
<td>519,885</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td>640,170</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td>Total</td>
<td>2,146,203</td>
<td>1,524,176</td>
<td>1,638,240</td>
<td>114,064</td>
<td>7%</td>
</tr>
</tbody>
</table>
Office of the Controller – Conclusion

The 2019 Office of the Controller budget request reflects increases that align with the stated goals of managing and processing core office functions of Accounts Receivable/Payable/Payroll/Grants/Cash Management/Purchasing, Annual Budget, Internal Audit & Internal Controls along with significant special projects and initiatives with financial oversight: Trades District, Switchyard Park, Convention Center, and both the current and new hospital sites.

Thank you for your consideration of the Office of the Controller 2019 budget request.

I would be happy to answer any questions.
Why We Exist

The Office of the Mayor provides leadership, management, communication and strategic direction to the City of Bloomington organization. This is accomplished through public engagement, in cooperation with City Council, to determine and implement the priorities of our community’s residents.
Background

- The Office of the Mayor is comprised of 8 regular FTEs and up to 4 interns
- **Four major functional activities**
  - Policy and Administration
  - Communications
  - Public Engagement
  - Innovation
Background

- Major Initiatives
  - Support and Maintain Public Safety, Civility and Justice
  - Affordable Housing
  - Facilitate Economic Development through Enhancing Quality of Place
  - Transparency/Community Engagement
  - Asset Management and Investment
  - Innovation
2018 Budget Goals Update

Policy and Administration
✔ Purchase of current Bloomington Hospital site
✔ ULI vision plan for future development of site
✔ Trades District/Dimension Mill development
✔ Switchyard Park construction beginning
✔ Conduct annual budget and strategic planning department head retreats
✔ Update and execute MOU with Indiana University to provide fire protection services and equipment at the Woodlawn Station

- Establish a citywide high-speed broadband network to enhance economic development for the community.
2018 Budget Goals Update

Communications

✔ Engage a wide range of audiences about City services.
➢ Conducted 4 press conferences and 5 Virtual Town Halls, all of which were streamed live on Facebook and watched for a total of 23,179 minutes, to better increase engagement with the public.
➢ Released 152 press releases in 2018 (through June) to better increase engagement with the public.
➢ Developed a citywide content calendar to better coordinate on press releases and social media posts with other departments.
➢ Hired a full-time Digital Communications Specialist to more efficiently manage digital communication with constituents.
➢ Developed a social media strategy to better engage with constituents online.
2018 Budget Goals Update

Public Engagement

✔ Sponsor community activities or events utilizing OOTM sponsor budget
  ● 7 events so far in 2018
➢ Begin developing community survey in Q2 2018
  ● To be implemented Q1 2019
  ● Data analysis to be completed Q2 2019
✔ Coordinate Statehouse lobbying effort to support community priorities, with weekly contact.
  ● Protect and promote city interests through monitoring applicable legislation in the Statehouse.
➢ Research community engagement portal for city employees to better serve constituents.
✔ Ensure proper staffing of City boards and commissions with less than 4% vacancy rate.
  ● 35 appointments and reappointments as of August 15
2018 Budget Goals Update

Innovation

✔ Develop a citywide approach to data-driven policy analysis and implementation.
✔ Utilize drones to expand operational capability and where possible use them to decrease risk for city employees in dangerous activities.
  ● City drones have been used to analyze traffic patterns, search for missing persons and more.
✔ Increase productivity through increased utilization of web-based collaborative software.
  ● Collaborated with the Street Department to purchase TransMap, technology that will assist with conducting a citywide survey of street pavement and sidewalk conditions, as well as an assessment of traffic control signage.
Activity Description: Provide strategic leadership to the City of Bloomington government. Be responsible for City programs, policies, initiatives and services. Transparently engage with and respond to residents, businesses and community partners to efficiently provide services to the community.

- Assemble and lead a team of department heads to provide efficient delivery of City services.
  - Conduct monthly meetings with department heads to manage progress on City initiatives and provide efficient delivery of City services.
  - Conduct annual budget and/or strategic planning retreat with department heads to set goals and develop the City’s annual budget.
  - Utilize Trello software within all departments as a management tool to accomplish the strategic plan and monitor progress regularly.
Continued: Policy and Administration

- Provide open, transparent access to information about City services to residents, businesses and all those who utilize City services.
  - Enhance engagement and responsiveness with the community by utilizing Director of Community Engagement to lead efforts that improve transparency and address residents’ ideas, questions and issues with City departments.
- Enhance business development opportunities in the community.
  - Establish a citywide high-speed broadband network to enhance economic development for the community.
  - Promote ongoing activation of the Trades District.
  - Plan the redevelopment for the current hospital site.
  - Collaborate with County government to plan for a new Convention Center.
2019 Budget Goals

Continued: Policy and Administration

- Invest in the repair and replacement of existing City-owned assets by providing necessary funding to all City departments responsible for such assets. Invest in new City assets that respond to needs of the community.
  - Complete construction of infrastructure in the Trades District by Q3 2019.
  - Complete construction of Switchyard Park by Q4 2019 to enhance Bloomington as an attractive place to live, work and play.
  - Replace and repair infrastructure in the Police, Fire, Public Works, Planning & Transportation, Parks & Recreation and Utilities departments.

- Support and maintain public safety, civility and justice by providing fire service and law enforcement and collaborating with agencies to promote justice and civility.
  - Implement, monitor and evaluate recommendations of the Downtown Safety, Civility and Justice Task Force.
2019 Budget Goals

Continued: Policy and Administration

- Implement and refine an affordable housing strategy that encourages the development of a variety of affordable and workforce housing products, in addition to office space, to accommodate projected growth in the Bloomington area.
  - Update the Unified Development Ordinances in Q1 and Q2 of 2019 to reflect community input regarding the built environment and sustainable development, and to accomplish balance in the type and affordability of housing product in Bloomington.
# Activity Highlight - Policy and Administration

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>2.93</td>
<td>268,233</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td></td>
<td>1,041</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>53,120</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>322,394</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Communications

**Activity Description:** Serve as the voice of the City of Bloomington government, transmitting information about City programs, policies, events, initiatives and services to Bloomington residents and visitors.

- Share information about how the City works for its residents, including sharing goals, services, activities and policies.
  - Write at least 100 OOTM-generated press releases and approve at least 75 department-generated press releases.
  - Arrange press conferences, virtual town halls and other public events as necessary.
  - Produce audio/video content for sharing via social media/website and serve as backup for the Digital Communications Specialist on social media/website.
  - Collect Facebook and Twitter analytics monthly to gather information about what residents want to see on our social media, to better craft future posts to reflect those wants.
2019 Budget Goals

Continued: Communications

- Share information about how the City works for its residents, including sharing goals, services, activities and policies.
  - Livestream City events on Facebook at least twice per month.
  - Collaborate with CATS to produce 30-minute monthly program featuring the Mayor and department heads to inform residents about City initiatives and timely issues.
- Create cohesiveness about information-sharing among entities within City government that produce messaging.
  - Monitor all City-affiliated social media accounts daily to ensure accurate information of value, and to assist departments with increasing their social engagement.
  - Create Social Media 101 class by Q3 for City employees to increase public engagement across all City social accounts.
  - Set up 10 training sessions per year for City employees who manage a City-affiliated social media account.
## Activity Highlight - Communications

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>2.55</td>
<td>233,182</td>
</tr>
<tr>
<td>200 - Supplies</td>
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<td>905</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td></td>
<td>46,179</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>280,265</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Public Engagement

Activity Description: Enhance engagement and responsiveness with the community by leading efforts to educate, improve transparency and the customer service experience, and address residents’ ideas, questions and issues with City departments.

- Conduct 2019 Community Survey (Q1).
- Increase opportunities for and communication with residents, neighborhoods, businesses and other groups through new online community engagement platform, beginning Q1. Track and share outcomes with City departments.
- Foster positive communications and relationships with key stakeholders.
  - Attend meetings with IU Health public relations team, IU engagement teams and IU Dean of Students.
  - Maintain frequent and ongoing contact with Greater Bloomington Chamber of Commerce, Cook, major employers and constituents.
2019 Budget Goals

Continued: Public Engagement

- Create a welcoming City Hall experience.
  - Approve City Hall public displays.
  - Implement customer service best practices through targeted trainings of frontline staff.
- Facilitate greater involvement between residents and their local government.
  - Use $35,000 budget to sponsor activities or events benefiting the community.
- Provide strategic communications direction and support.
  - Contribute to daily meetings with administration.
  - Act as backup to Communications Director.
- Coordinate lobbying effort to support community priorities, with weekly contact throughout legislative session.
- Provide outreach to City Council regarding policy issues.
- Collaborate with City Council members to attend neighborhood meetings and address issues and concerns.
- Ensure that boards and commissions are fully staffed with no greater than 4% vacancy rate.
### Activity Highlight - Public Engagement

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>1.97</td>
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</tr>
<tr>
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<td>698</td>
</tr>
<tr>
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<td>35,614</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>216,148</strong></td>
</tr>
</tbody>
</table>
2019 Budget Goals

Innovation

**Activity Description:** Serve as a catalyst for innovation and experimentation in City Hall, developing new processes, spurring creativity, and improving services for Bloomington residents and visitors.

- Research third-party software platforms to solve ongoing issues, make current processes more efficient and effective, or answer questions within City departments.
  - Assist with finding and selecting appropriate process management software for Planning & Transportation, HAND, Fire and other departments.
  - Research and select contact management platform for customer service delivery for piloted use by OOTM and ESD, with expansion to all departments.
2019 Budget Goals

Continued: Innovation

- Research models from other cities and/or peer communities for benchmarking.
  - Identify 3 innovation projects being done at similar-sized cities for implementation in Bloomington.
- Use $50,000 Innovation fund to improve operational efficiency by purchasing software, products, etc. for City departments.
  - Conduct an open application process to support 3 projects at City Hall that save money, improve efficiency, and increase resident satisfaction.
- Enhance relationships with both internal and external constituents to continue project collaboration and keep innovation momentum.
  - Partner with 3 nonprofits/small businesses/community organizations to implement innovation projects with community benefits.
## Activity Highlight - Innovation

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>Staffing (FTE)</th>
<th>2019 Budget $</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
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</tr>
<tr>
<td>200 - Supplies</td>
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<td>550</td>
</tr>
<tr>
<td>300 - Other Services</td>
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<td>28,069</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>170,357</strong></td>
</tr>
</tbody>
</table>
Office of the Mayor – Budget Highlights

Category 1 – Personnel - $822,989
This category has a requested increase of $98,839.

- **Line 111 - Salaries and Wages - Regular:**
  - The transfer from ITS of the salary and benefits for the Digital Communications Specialist position to the Office of the Mayor, totalling $57,620, is the most significant change in the OOTM personnel category 1 increase. The balance of the increase in this line is due to 2% increases in salaries.
  - The OOTM Customer Service Representative III position was evaluated and the pay grade adjusted by the City’s Job Evaluation Committee. As a result of that review, a recommendation was made to rename the position Administrative Coordinator and increase the compensation from $35,033 to $37,023.

- **Line 112 - Salaries and Wages - Temporary:**
  - $9,752 increase to support hiring a Communications Intern.
Office of the Mayor – Budget Highlights

Category 2 – Supplies - $3,193
This category has a decrease of $3,062.

Significant decreases include the following lines:

- **Line 211 - Office Supplies**: This line decreased by $415 as requested purchases from last year’s budget (standing desk) have been fulfilled.

- **Line 242 - Other Supplies**: This line decreased by $3,062 as requested purchases from last year’s budget (camera/associated supplies and easels) have been fulfilled.
Category 3 – Other Services and Charges - $172,732
This category has a requested increase of $4,135.

Significant changes include the following budget lines:

- **Line 321 – Telephone**: Increase of $1,440 to reflect the cost of a monthly data plan for two cell phones, one each for the Communications Director and the Digital Communications Specialist. These phones will be utilized for Facebook Live events, or press conferences and other events that will be livestreamed on Facebook.
- **Line 396 – Grants**: Decrease of $15,000 to more accurately reflect the amount spent to sponsor local organizations and programs in recent years.
- **Line 399 – Other Services & Charges**: Increase of $16,075, primarily for the cost of an online public engagement platform (PublicInput.com or similar).

Category 4 – Capital Outlays- $0
# Office of the Mayor – Budget Summary

<table>
<thead>
<tr>
<th>Budget Allocation</th>
<th>2017 Actual</th>
<th>2018 Budget</th>
<th>2019 Budget</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 - Personnel Services</td>
<td>620,890</td>
<td>724,150</td>
<td>822,989</td>
<td>98,839</td>
<td>14%</td>
</tr>
<tr>
<td>200 - Supplies</td>
<td>5,984</td>
<td>6,255</td>
<td>3,193</td>
<td>(3,062)</td>
<td>-49%</td>
</tr>
<tr>
<td>300 - Other Services</td>
<td>73,981</td>
<td>158,847</td>
<td>162,982</td>
<td>4,135</td>
<td>3%</td>
</tr>
<tr>
<td>400 - Capital Outlays</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>700,855</td>
<td>889,252</td>
<td>989,164</td>
<td>99,912</td>
<td>11%</td>
</tr>
</tbody>
</table>
The 2019 Office of the Mayor’s budget request reflects increases that align with the stated goals of supporting and maintaining public safety, civility and justice, transparency, innovation, economic development and public engagement.

Thank you for your consideration of the Office of the Mayor 2019 budget request.

I would be happy to answer any questions.