## Organizational Information (PB-2 Form)

The Organizational Summary (PB-2) Form provides information about the Office’s or Department’s organizational structure including current organizational structure and proposed organizational and position changes.

**Organizational Structure:** Briefly discuss any changes to the Department’s organizational structure since October 1, 2023, and any proposed organizational changes. A current organizational chart, as well as an organizational chart noting any proposed changes, should also be submitted. Please ensure that the organizational chart accounts for all FTEs on the Department’s Positions tab and is based on the organizational units within the SAP financial system. If there are security concerns about releasing the organizational chart, contact PBO to discuss the appropriate degree of detail to include. For questions regarding organizational units in SAP, contact the assigned Compensation Team Member in HRMD.

**Internal Reallocations of Budget:** Describe any proposed internal reallocation of any existing resources. Reallocations must be fully budgeted within the FY 2025 Budget Workbook. PBO will review proposed internal reallocations to ensure that they meet the current requirements for existing services and programs. PBO will closely scrutinize the enhancement of existing programs or creation of new programs using internal resources, especially if the program lacks adequate performance measures. All planned cost-neutral budget reallocations or reorganization of personnel must be submitted to PBO by April 22, 2024. Any requested changes submitted after April 22 will be considered at the discretion of PBO.

**Long-term Plans and Formal Studies:** Discuss any long-term plans or formal studies recently completed, underway or planned for the near-term in your Office or Department. Please share annual work plans and priority areas of focus for the future. Also be sure to note any external studies or assessments that will have future budgetary implications.

**Proposed Changes:** Proposed position changes such as Reclassifications, Internally Funded positions, Fund changes, Fund Center changes, and Career Ladders may require a memo with the justification for the requested action , a PAQ (or draft job description for new jobs), a new organizational chart with the proposed changes, highlighting the change on the Positions tab in the Budget workbook, or noting the change in the Proposed Position Changes List tab in the Budget workbook. Please see the table below for further guidance on what is required for each proposed action.

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|  If you have the following: | **Memo to PBO and HRMD\*** | **PAQ (or draft job description for new jobs)\*** | **New Org Chart w/Proposed Changes\*** | Proposed Changes highlighted in Positions tab in Workbook | Proposed Changes included in Proposed Position Changes List tab in Workbook |
| Reclasses | X | X | X | X | X |
| Internally Funded | X | X | X | X | X |
| Fund Changes |  |  | X | X | X |
| FC Changes |  |  | X | X | X |
| Career Ladder |  |  |  | X | X |

\*Must be included in the FY 2025 Budget Submission uploaded to SharePoint and emailed to Ruby Sanchez with HRMD at ruby.sanchez@traviscountytx.gov.

Memos should fully describe and justify the proposed change. This should include a description of why the change is necessary, what programmatic areas will be impacted, how a potential salary change will be funded, as well as any space and technology needs. Please note, Departments are responsible for contacting ITS and FMD directly for all space and technology needs.

All costs related to internally funded new positions including one-time costs such as space, equipment, furniture, and vehicles, as well as ongoing costs such as operating supplies, must be available within the Department’s existing resources, with the cost figures verified by the appropriate administrative support Department. **A PB-4 and PB-5 must be submitted for items that are not proposed to be internally funded.** Offices and Departments should submit an estimate of cost from the relevant support Offices and Departments (such as ITS, TNR, or FMD) with the FY 2025 Budget Submission on April 22, 2024. For that reason, PBO urges Offices and Departments to begin working with these support Departments as soon as possible. For questions regarding which support Departments may be impacted, please contact the assigned Planning and Budget Analyst. Individual assignments and phone numbers are listed in section six of the Appendix.

PBO will discuss all proposed FY 2025 organizational and position changes with HRMD for review and input for any recommended changes in the FY 2025 Preliminary Budget.