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UC ANR Flexible Work Guidelines & Toolkit

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UC ANR Flexible Work Guidelines and Toolkit

Overview

The University of California Agriculture and Natural Resources (UC ANR) seeks to be an employer of choice that provides a work environment that attracts and supports a diverse set of talented employees. UC ANR is exploring ways to advance its goals, promote efficiency and help employees balance work and personal responsibilities through the use of flexible work schedules, when possible.

Many employees are increasingly seeking flexible work arrangements that would provide opportunities to (1) **work remotely** from home or another location that is outside of their official post of duty, and/or (2) **work flexible hours** that vary from the traditional “8 to 5.” That said, the success of UC ANR’s research and extension work and related outcomes relies upon building and maintaining trusted relationships within our communities.

The majority of UC ANR’s research and programmatic work takes place at our local offices or in public locations and is executed in-person. While we have found opportunities to make remote-work adjustments, many of which will change the way we deliver our work indefinitely, successfully delivering UC ANR’s research and extension mission still necessitates in-person connectivity.

It is important for managers and employees to know that flexible work options are possibilities, not guarantees. Not all positions lend themselves to flexible work arrangements; moreover, agreements for flexible work can be modified or revoked in accordance with the needs of UC ANR.

These flexible work protocols are being implemented on a trial basis. UC ANR will routinely evaluate the Flexible Work Guidelines over the next 12 months to determine efficacy and may alter or rescind any or all of the posted protocols at any time.

Culture of Flexible Work

Fostering a collaborative, successful flexible work environment requires intentional effort by both employees and managers. Managers should encourage their teams to practice self-awareness and assume positive intent. In addition, managers should adhere to flexible work principles of fairness and equity when assigning work, scheduling meetings, and setting standards for communication (office hours, standing check-ins, availability for meetings, etc.) among team members. If properly balanced, flexible work arrangements benefit the employee and the organization equally.

Employees must continue to comply with all University and UC ANR policies and procedures when performing work pursuant to a flexible work arrangement. Noncompliance with policies and procedures may result in rescission of the flexible work agreement and/or corrective action.

Benefits to UC ANR:

- *Improve employee engagement, productivity, and retention:* Flexible work arrangements are preferred by employees, may reduce turnover costs; fewer absences/sick days; improve employee health; and improve morale, engagement, and job satisfaction.
- *Broaden the pool of available talent, increase diversity:* Flexible work arrangements facilitate our recruitment efforts to hire the best available talent. UC ANR can also more readily hire part-time, semi-retired, disabled, or homebound workers.
- *Use UC ANR workspace more efficiently and save money:* UC ANR can optimize its use of its limited office space and parking by offering flexible work opportunities.

- *Ensure business continuity:* Flexible work schedules allow employees to remain productive during emergencies, such as a power outage or pandemic.
- *Contribute to sustainability goals:* Flexible work opportunities may reduce our carbon footprint by reducing employee's commute to University locations.

Benefits to Employees:

- Reduce commute time, costs, and stress;
- Balance work and home life more easily (e.g., being able to schedule doctor, repair, and other significant appointments during the workweek);
- Maintain better health;
- Work when you are most productive;
- Work when and where you have fewer distractions; and
- Provide dependent care.

Benefits to the Community:

- Decreased traffic congestion; and
- Reduced air pollution

In order to support the ongoing benefits of flexible work, UC ANR's [Principles of Community](#), teamwork and collaboration should be maintained, as they would be in person. Employees must continue to comply with all University policies and procedures when performing work pursuant to a flexible work arrangement.

Eligibility

Eligibility for a flexible work arrangement is determined by an employee's job duties. Flexible work agreements should include the percentage of time that a job may be performed remotely. If there are elements of the position that must be performed in person, those should be clearly outlined in the flexible work agreement. Not all employees and positions are suitable for flexible work; however, each new or modified flexible work arrangement must be evaluated objectively and fairly to ensure an equitable process.

Decisions about which positions are eligible for flexible work should be based on operational and business needs and made without bias or favoritism.

Flexible Work Arrangements ARE:	Flexible Work Arrangements ARE NOT:
• Flexible, they include variations in when, where, and/or how work is done	• An entitlement or reward
• Focused on overall business goals	• A private arrangement or special deal
• Planned and predictable	• For every employee or every job
• Structured to emphasize the long-term rather than the short-term	• Applicable only during crises

Equity

Decisions about which positions are eligible for flexible work should be based on job duties as defined by the employee's supervisor. It is recommended that, initially, all jobs in a department be evaluated for

flexible work eligibility and that position descriptions be evaluated at that time, to avoid potentially disparate results.

In addition to ensuring that we make decisions equitably, there are several factors that must be considered before entering into a flexible work arrangement, including:

- the overall best interests of the UC ANR department's operational and business needs
- the nature of the job duties to be performed;
- employee and unit productivity;
- federal and state laws;
- union contracts;
- task interdependence and other operational constraints;
- health and safety consequences;
- benefits issues; and
- performance management.

Types of Flexible Work Arrangements

Flexible work options offer creative approaches for completing work while promoting balance between work and personal commitments. These arrangements involve the use of non-traditional work hours, locations, and/or job structures. Except in the case of conversion from full-time to a less-than-full time schedule, such as for a part-time assignment, the total numbers of hours worked and expected productivity remain the same.

A. Flexible Work Schedules/Flextime

Flexible working, or 'flextime,' is a scheduled arrangement in which employees continue to work a full day but with varied workhours outside of the typical '8 to 5' work day. Flexible arrangements are usually established with a set range of start and end times, and may include core working hours when all staff must be at work.

B. Telecommuting/Remote Work

Remote Work is an arrangement to work from a site other than the primary UC ANR provided workspace as the employee's work location. Telecommuting is an arrangement for some part(s) of the employee's work or workweek to be performed at a location away from their UC ANR provided workspace (official post of duty) on a regular, recurring basis. These may be the most complicated flexible work options to arrange since it generally requires coordination of schedules with other staff to make sure that on-site business needs are met.

Employees working outside of their official post of duty may have "regular" or flexible work schedules.

C. Compressed Work Schedule

A traditional 40 hour work week is condensed into fewer than five days of work. This option should be extended with expectations of work hours clearly established.

UC ANR California Residency Expectation

UC ANR is funded and supported by the people of California. As the cooperative extension arm of the University, UC ANR's role is to bring vital, practical, science-based information to California land and business owners, consumers, youth, families, and whole communities. Successful extension efforts are built upon trust that is developed through community interaction over time. While the organization was forced to engage remotely during the peak of COVID shut-downs, permanent remote engagement undermines UC ANR's ability to effectively deliver its cooperative extension mission.

Given the need for in-person engagement, it should be assumed that all UC ANR personnel will reside within the state of California, with only a few rare, temporary exceptions as outlined in the table below. In the rare and unlikely event that out-of-state residency is absolutely necessary for effective UC ANR operations, those exception requests will be evaluated on a case-by-case basis. Those who supervise others, CE Specialists, CE Advisors, Community Educators or anyone in a community engagement role are not eligible for an out-of-state exception other than as listed in the table below.

Note that all exceptions must be approved by the employee's supervisor, the Unit Director, the unit's Associate Vice President, and UC ANR Human Resources.

Exceptions to UC ANR's Expectation of California Residency

Type of Exception	Approval Condition	Recommended Length
Official Post of Duty Near CA Border: employee's official post of duty is near the border of another state (e.g., Intermountain REC near the Oregon border) and employee is still within daily commute distance of the post of duty	Supervisor confirms that employee lives within daily commute distance of the post of duty and can still perform all in-person duties as required	N/A
Temporary Accommodation: only for an extenuating circumstance when the employee has a specific need (e.g., medical- or disability-related) and <u>temporarily</u> cannot come back to California or needs to be out-of-state.	Supervisor confirms the request is based on a bonafide limitation with a true end date. If physical presence <i>is required</i> to complete essential functions of the position, accommodation may be denied.	Up to 6 months, on a non-precedent-setting and non-renewal basis.

It is important to note that UC ANR protocols regarding employment of individuals living outside of California may be amended at any time – by the University, by UC ANR, by the state legislature, etc. Out-of-state approval does not exempt employees from adherence to UC policies, including UC Vaccine policies.

Roles and Responsibilities

A. Employee

Employees should first complete the [Flexible Work Arrangement – Decision Matrix](#) to help determine if they are ready for a Flexible Work Arrangement and think through how it might affect their business unit. The next step is to develop a [Flexible Work Agreement Form](#) for the manager's consideration.

If a Flexible Work Agreement is executed, staff members must:

- remain accessible;
- check in with the supervisor to discuss status and open issues;
- continue to meet performance expectations
- be available for online meetings (e.g., Zoom), with cameras turned on as a standard practice;
- be available to come into their official post of duty if a business need arises;

- request supervisor approval in advance of working any overtime hours (if employee is non-exempt); and
- request supervisor approval to use vacation, sick, or other leave in the same manner as when working at employee's regular work location;
- be able to work the hours agreed to by the Manager with any deviations pre-approved by the Supervisor.

B. Manager

Managers are responsible for establishing standard practices for their group or unit which are consistent with division-wide guidelines. Flexible Work Arrangement requests should be reviewed on a case-by-case basis by evaluating the needs of the business unit and its internal and external clients, the individual's performance, responsibilities and work style. The same principles apply to managing remotely as managing on-site.

Managers should look at the duties/responsibilities outlined in the employee's Job Description and note the work that can be conducted remotely and the work that cannot.

With equity in mind, managers should be consistent in their approach and in the treatment of their employees. Any changes to Flexible Work Agreements must be done with thought, reason, and both written and verbal advanced notice. A minimum notice period of 30 days is typically required, except in the case of emergencies.

Flexible work arrangements require both supervisor and director approval. Human Resources will retain a copy of the flexible work arrangement for the personnel file and for reporting purposes.

Trainings Provided - In order to help Managers with readiness and ability to manage remotely and to anticipate and prepare for the challenges that might arise, Managers may participate in the training: ["Managing a Hybrid/Remote Workforce"](#).

Not all flexible work arrangements are the same. Each flexible work arrangement must fit both the person and the position. Additionally, it should take into account an individual's work performance, needs, and client-facing responsibilities. Managers will need to be especially clear about how they will assess outcomes for a staff member who is performing mostly remote work. Directors and managers are leaders, coaches and mentors and are responsible for the success of their team(s), therefore UC ANR leaders should plan to be available at their official post of duty or secondary UC ANR location for at least 60% of their workweek.

C. Human Resources

Human Resources will serve as a resource to both employees and supervisors/directors when evaluating the possibility of a flexible work arrangement. Should an employee and supervisor not be able to come to a decision, the unit director will first work with the supervisor to review options. Human Resources will collaborate and facilitate when necessary.

Flexible Work Considerations

A. Compensation

Wages must be consistent with UC personnel compensation policies, even for fully remote employees whose services are performed away from their official post of duty. Work hours and expectations should not be affected by the employee's flexible work schedule.

An employee's salary must be within the salary range that is assigned to the job title based on the associated position's duties and responsibilities, even for fully remote employees whose services are performed away from the job location in California or in another state.

B. Health and Welfare Benefits

Employees who live or relocate outside of a benefit plan's coverage area may have limited benefits and provider options. If employees have questions about specific insurance options when they move outside of their plan's coverage area they may contact ANR Human Resources or UCPATH for additional information.

Employees are responsible for updating their personal information in UCPATH. Employees who move out of their plan's coverage area have the opportunity to select a new plan that will offer in-network care. If employees have specific questions about updating their personal information or changing their benefit plan, they should contact UCPATH.

C. Payroll and Tax

The University is registered in all 44 states that impose an income tax. To ensure appropriate tax withholding, current UC employees who relocate outside California must change their address and withholding information in UCPATH to the state in which the employee's services are performed (not the UC job location).

Tax withholding for fully remote UC employees who reside and work outside California is based upon the state where the employee's services are actually performed. Employees should be aware of and understand California tax residency rules and work with their outside tax advisor to understand any possible California tax liability given their particular residency and remote work circumstances.

Departments should be aware that there are some jurisdictions, such as the City of Seattle, that have a payroll expense tax that is imposed on the employer but not the employee.

D. Travel Reimbursement

Remote and Hybrid-Remote employees who are working outside of their official post of duty at their own convenience are not on travel status as defined in [Business and Finance Bulletin G-28, Travel Regulations](#) as "the period during which a traveler is traveling on official University business outside the vicinity of their headquarters or residence." If an employee must travel to their official post of duty that is considered a non-reimbursable commuting expense.

When not on travel status, mileage reimbursement shall be made for mileage expenses incurred between their official post of duty and the assignment location, or home and the assignment locations, whichever is less.

For employees living outside of California, note that [State law AB 1887](#) prohibits UC's use of State General Funds to pay for travel to states that have laws that discriminate based on sexual orientation, gender identity, and gender expression, or to states that have passed a law repealing such protections. There are currently 17 states on that list. Employees working outside California should be aware that UC ANR is prohibited from ever reimbursing travel to one of these states.

E. Technology Needs

ANR will provide employees with one set of standard IT equipment needed to perform their job duties. ANR provides a wide range of tools that aid effective and productive teamwork, including but not

limited to virtual private network (VPN) software, single sign on (SSO) & two-factor authentication, email and calendar, soft phone dialer, video and audio conferencing, electronic document storage, and other corporate technology tools such as financial, collaboration and productivity applications.

For employees working remotely 50% of the time or more, additional equipment may be provided by ANR to reasonably accommodate specific needs. If departments have funds available, the following equipment may be provided for an employee's use in a remote office.

1. Standard Monitor
2. Docking Station
3. Keyboard
4. Mouse
5. Wrist pad
6. Footrest

Directors should consider funding and ergonomic needs prior to considering purchasing additional equipment. Directors should confirm appropriate use of fund sources with their respective business officers and ANR Resource Planning and Management before purchasing.

The employee is responsible for supplying any equipment needed for their workspace not provided (e.g., printers, chairs, desks, etc.). Any ANR-owned and issued equipment must be properly returned prior to separating from employment. The employee is responsible for working with their supervisor and appropriate department to arrange timely return of equipment.

F. Ergonomics

ANR is responsible for ensuring that that work assigned to the employee can be performed safely offsite and for providing the employee with ergonomic equipment in accordance with local procedures. When performing work for the University, the employee is responsible, at their own expense, for maintaining a safe and secure work environment and for arranging the remote worksite in an ergonomically sound manner.

G. Disability Management

Requests for disability accommodation should be handled in accordance with all applicable personnel policies. This includes situations where an employee with a disability requests a flexible work arrangement as a reasonable accommodation. It also includes situations where a hybrid remote employee with a disability may need a reasonable accommodation in order to perform the essential functions of their position.

H. Workers' Compensation

Work-related injuries incurred in the off-site workspace, during agreed upon working hours, should be reported promptly to the supervisor. Such [reports of injuries](#) will be handled in the same manner as reports of injuries in the UC ANR workplace. Workers' compensation laws vary by state. Employees working outside California should address any questions to the Workers' Compensation manager at their headquarter location or to Systemwide Risk Services.

I. Employee Assistance Resources

Employees' mental health is as important as their physical health. The [Academic and Staff Assistance Program](#) offers confidential, cost-free assessment, intervention, consultation and referral services to all ANR employees and their immediate families.

Submission & Approval of Flexible Work Agreements

Approval of flexible work arrangements are under the authority of the unit director. The standard approval process is described below:

1. Employee reviews the [Flexible Work Arrangement – Decision Matrix](#) (for telecommuting or remote work options).
2. Employee submits the [Flexible Work Agreement Form](#) to supervisor for review.
3. Supervisor reviews, discusses expectations with the employee and submits to Director for approval.
4. Director makes the final decision. If approved, submits the approved form to Human Resources.
5. Human Resources places form in personnel file and uses documentation to periodically evaluate for equity.
 - Employees and Supervisors may reach out to Human Resources to discuss questions, thoughts or concerns at any time during this process.

Initial flexible Work Agreements will be entered into for an initial trial period of three to six months and will be reviewed at the end of the trial period, in order to evaluate effectiveness and make adjustments as necessary. Thereafter, quarterly reviews are recommended. Those employees wishing to have a flexible work arrangement after UC ANR reopens on July 1, 2021, must have an approved Flexible Work Agreement on file with HR no later than September 30, 2021.

Flexible work agreements are subject to ongoing review by managers/unit directors and employees and may be modified or rescinded with reasonable notice in accordance with local procedures. A minimum notice period of 30 days is typically required.

Examples of situations that may require an amendment or rescission of an approved flexible work agreement include, but are not limited to:

- Business needs are no longer being met
- Job requirements or duties change
- Current coverage or staffing needs change

The process used to revise or end a work arrangement should be as careful as the process to initiate it. If an urgent or emergency situation arises, please contact humanresources@ucanr.edu to discuss potential solutions and timeframes.

Toolkit Links & FAQs

- [Flexible Work Arrangement – Decision Matrix](#)
- [Flexible Work Agreement Form](#)
- Link to training: [Managing a Hybrid/Remote Workforce](#)
- UC ANR's [Principles of Community](#)
- [Flexible Work Arrangements - Frequently Asked Questions](#)

For any questions regarding UC ANR's Flexible Work Guidelines, contact humanresources@ucanr.edu.