

FLEX WORK TOOLKIT OVERVIEW

Introduction

The University Staff Advisory Committee (USAC) Staff Compensation and Benefits Subcommittee (SCBS) is charged to evaluate and make recommendations on policies and issues affecting staff compensation and benefits, health and wellness, and the staff experience as a whole. In summer 2018, SCBS identified four key goals that would drive much of the subcommittee work throughout 2018-19, one of which was to collaborate with the President and Provost's Council on Women (PPCW) to create a campaign to raise awareness regarding the Flexible Work Policy (a charge given to PPCW by the President and Provost).

Institutional Challenges

The current [Flexible Work Policy](#) (6.12) has been in place at Ohio State since 2011. While the policy is clear about the possibility of and benefits to a flexible working arrangement, the execution of this policy is applied unevenly within various units and colleges of the university. Through SCBS's work this year, we identified five key challenges to the effective utilization of the Flexible Work Policy:

- While university leadership recognizes and supports the existence of the policy, support from individual unit leadership varies. Some employees have indicated that unit leaders have noted that the Flexible Work Policy is not utilized at all within the unit.
- Not all roles at Ohio State are conducive to a flexible work arrangement and not every position lends itself to flexible work. However, there seems to be a significant disparity *within* units regarding the application of flexible work arrangements for similar roles (some employees are able to use flexible work, while other employees in similar roles are not allowed).
- The policy encourages managers to be transparent, but there is no current requirement on the [Flexible Work Arrangement Proposal](#) for managers to justify why a flexible work request is denied. Such a lack of transparency may lead to miscommunications about the policy itself, poor supervisor/employee relations, and negatively impacts the employee's ability to use the policy in the future.
- There is a general lack of awareness about the policy by both employees and managers, indicating a need for greater value placed on openness and flexible work arrangements in the workplace. A lack of resources about how to implement, monitor, and evaluate flexible work arrangements is also a challenge for managers and employees.
- There is currently no mechanism to collect data on flexible work arrangements at Ohio State (requests submitted, requests approved or denied, ongoing arrangements). No data is being collected and aggregated at the college or university level that provides insight into the current use of the policy.

SCBS Response to Challenges

To address these challenges, USAC has partnered with PPCW to create a “Flexible Work Tool Kit,” to provide valuable resources that managers and employees across campus and the Medical Center can utilize when discussing flexible work arrangements. To develop the tool kit, members of SCBS conducted interviews of employees and managers to gain a better understanding of the benefits and challenges around flexible work arrangements.

The Flexible Work Toolkit

The tool kit, which will be housed on the USAC website, will include the following resources:

- *Flex Work “Road Show” PowerPoint*, that HR professionals and supervisors can share;
- *Flex Work Flyer*, to distribute to employees and widely raise awareness about the policy;
- *Flex Work Scenarios*, showing the variety of flexible work arrangements to help employees better understand the possible application of the policy to their specific situation;
- *Conversation Guide with your Manager about Flex Work*, to provide communication strategies, performance tools, and negotiation tips to help set up a flexible work arrangement; and
- *Flex Work Spotlight video*, to highlight the successes of individuals and units who have successfully implemented flexible work arrangements.

Work Remaining

SCBS is currently making final edits to the Flex Work Toolkit, and once finalized, the committee will socialize these resources with the policy owner in the Office of Human Resources to ensure that there is consistent messaging about the policy. SCBS will continue to collaborate with PPCW to widely publicize the Flex Work Toolkit across campus and the Wexner Medical Center throughout Spring 2019.

SCBS members also plan to meet with members of the OHR policy team to discuss ways to ensure alignment of messaging around the Flex Work policy. This meeting will take place in April.

Recommendations and Next Steps

SCBS recognizes the lack of data available on the use of flexible work arrangements at Ohio State, which leads to potential issues of inequities and disparities around how flexible work is made available to employees. In addition, a lack of data prevents university leadership from clearly understanding the impact that flexible work has on the employee community.

To continue promoting The Ohio State University as a workplace of choice, SCBS believes that data collection and reporting regarding the Flex Work Policy is imperative. SCBS echoes the recommendation of PPCW to track the use of flexible work arrangements university-wide and share that data annually. Data collection may include:

- Number of formal requests for flexible work arrangements received by the unit each year;
- Number of requests approved;
- Number denied and justification for denial;
- Number of current, ongoing flexible work arrangements
- Demographics of employees requesting flexible work arrangements

SCBS believes that the university is at an optimal stage to consider the creation of a process and workflow for Flexible Work data collection as the Enterprise Project and overall business transformation continues to be built out. To this end, SCBS will engage with key partners over the next 6 months to recommend that a data collection mechanism be integrated into the new business processes being established.

SCBS echoes PPCW's recommendation to update the Flexible Work Arrangement proposal form to include a justification on the form, requiring managers to provide a business reason for denying a flex work request. This simple, but effective, addition to the form will provide enhanced clarity around flex work decisions, reduce inconsistencies in the approval of flex work requests within units, and ensure proper communication between employees and their supervisors.

From this work, SCBS recognizes the incredible potential front-line and mid-level managers have on the ability to promote flexible work arrangements and enhance the employee experience. To this end, SCBS plans to explore the possibility of creating a USAC Manager Award to recognize the efforts that managers make to create a productive and flexible work environment within their units.

CONVERSATION GUIDE WITH YOUR MANAGER ABOUT FLEXIBLE WORK ARRANGEMENTS

Ways to Prepare

- Familiarize yourself with the Ohio State University Flexible Work Policy (HR policy #6.12).
- If anyone in your unit or college has a flexible work arrangement, ask if they would be willing to speak with you about it. Get ideas from colleagues who have a similar position in another unit. Having an idea of what already works may be helpful as you frame your request.
- Set a meeting with your manager, leaving plenty of time to have a conversation without being rushed. Notify your manager ahead of time that you want to talk about a flexible work schedule.

Meet with your Manager

- Bring a completed copy of the [Flexible work arrangement proposal](#) and read it in advance.
- Write and discuss a proposal with your manager.
 - Set a clear plan before the meeting about what your ideal flexible work schedule will look like. Present details to your manager about what your optimal schedule will be and how you will adjust your responsibilities to continue to be successful in your role.
 - Come to the meeting with suggestions for frequency and terms for evaluation of your flex work schedule. Outline how your performance objectives will continue to be met.
 - Share any needs you may have from your employer such as technology or equipment.
 - Anticipate questions that may come up and make sure you have an answer for them.
- Explain why a flexible schedule will benefit your unit/team, using data to make your case. ([Example](#))
- If your manager does not like your proposal, ask questions about other options that may be available to you. You may also consider offering a trial period; remember, this is a negotiation. You may need to be open to collaborating with your manager to find a solution that works for both of you.

If your Proposal is Accepted

- Create a communication plan to share your new arrangement with your colleagues. Identify potential challenges (like office coverage or meeting times) that may need further discussed.
- Continually touch base with your manager. Ensure they are comfortable with the arrangement, and if not, identify solutions to these challenges.
- Communication is key. Remember, you are proposing this arrangement, so it is important to be responsible for making it work with your manager and your office colleagues. Consider proposing a check-in one month after the flexible work arrangement begins.

If your Proposal is Denied

- Ask why your request was denied. Was it your proposal? Position? Current job performance?
- If possible, work with your manager to identify steps to take that would get you to the goal of a flexible work arrangement. Remember, this conversation does not have to be a one-time shot. It may take ongoing conversations with your manager to come to an acceptable solution for both of you.

EXAMPLES OF FLEX WORK SCENARIOS

This document is intended to provide staff with examples of how flexible work arrangements might be used, based on specific employee needs. This list is meant to give staff ideas but is not a comprehensive list of types of flexible work arrangements that may be available to you. Staff should keep in mind paid parental leave and FML may be available for use in some of the examples below as well.

Sarah is a non-exempt staff member who serves as an Executive Assistant in the medical center. She recently gave birth to her first child and it is important to her to be able to spend time with her baby. Sarah requested to have a reduction in her schedule. By reducing her FTE she was able to work with her supervisor to create a schedule that allows her to spend more time at home with her child and still meet the expectations of her job.

Fred is an exempt Program Coordinator on the academic campus, and a large part of his workday involves meetings with faculty members and planning programs. He and his partner recently adopted a child, and in addition to using his paid parental leave, he requested some flexibility with work in order to meet the needs of his family. His partner can stay home with their child Monday-Thursday, but it is necessary for Fred to be home with his child on Fridays. Fred arranged a schedule where he works 10 hours a day Monday-Thursday so that he can be home one day a week. Faculty in his department are aware of his schedule, and they arrange meetings and special events to occur Monday-Thursday when Fred is in the office.

Jessica is a non-exempt employee in the medical center who has two middle-school aged children who ride the bus to and from school each day. She has established a flexible schedule with her manager that allows her to work Monday-Friday from 7:30 am-3:00 pm in order to get her kids on and off the bus each day. Jessica takes a 30-minute lunch break instead of an hour to accommodate for the extra 30 minutes per day and can meet the needs of her family and employer.

Paul is an Academic Advisor is taking advantage of the Ohio State tuition benefit to pursue his MBA. Paul has a course that meets during the day, so he requested a flexible work schedule from his supervisor. Paul's supervisor has allowed him to use a flexible schedule and work late two nights a week and continue to meet his job performance goals. Paul uses his Ohio State issued iPad at home to take academic advising appointments via Skype or phone which has been a popular option and benefit for students who have trouble coming in to see an advisor during the typical 8 am-5 pm hours.

Stephanie is a Program Manager in the Medical Center. Her mother suffers from ongoing health issues that require appointments 1-2 times a week for 2-3 hours at a time. Stephanie is her mother's primary caregiver and is responsible for taking her mother to the doctor's office, she is also eligible to use FML to help provide care. Stephanie's manager noticed that she had depleted a large amount of sick time by taking her mother to and from appointments, so she brought up the idea of a flexible work schedule during their most recent meeting. Stephanie's manager presented an option that she could think about organizing her schedule and notify clients so that she may take meetings while in the office and save any appropriate projects or email follow-up for the waiting room during her mother's appointments or at

home later in evening. Stephanie tracks her hours and takes advantage of down-time during her mother's appointments and in the evenings. She and her supervisor check-in bi-weekly to make sure the arrangement is still working for everyone involved and make any necessary adjustments. This schedule has allowed Stephanie to save sick-time for later, while still meeting the expectations of her job and the care-giving needs of her mother.

José is a Service Desk Technician at the Wexner Medical Center. His spouse was being relocated to Virginia for work, so he decided to have a conversation with his manager to see if she would be willing to adjust his work schedule to accommodate this relocation. José's manager was happy to work out an arrangement with him, because she didn't want to lose a talented employee like José who has such a strong and necessary skill set, and she deeply values Jose and his contributions to the work of her team. José and his manager put together a plan that allows him to work from home Monday through Friday using technology, such as Jabber to quickly communicate with members on his team and WebEx video conferencing to participate in various work meetings. He plans to come into the office for at least one week on a quarterly basis in order to connect and engage with his team members face-to-face. José and his manager feel that this accommodation is a win-win situation, since the organization is able to retain top talent and José is able to continue contributing to the work in his department while also being present at home with his spouse.

Physical space is an issue in the IT department that Marcus manages. Many employees are required to share office spaces, and at times, Marcus notices the staff experiencing difficulties in their daily productivity due to distractions and problems rising among the staff when private meetings need to occur. Marcus has presented the option to all employees, whether they are exempt or non-exempt, that they could choose to work from home two days per week, utilizing technology like Skype for Business and University issued iPads and laptops to complete their tasks. Due to the nature of their work, all staff members are required to be available during the "core working hours" of 10am-3pm; however, they are given the flexibility to work any hours outside of this timeframe whenever they choose, whether it be in the morning, afternoon, evening or some combination of these. Staff members that choose this option establish these working hours at the beginning of each semester to ensure that any necessary adjustments are made, and that changes are communicated to clients appropriately.

Alisa works for the IT department and in conjunction with the ADA office, set up a flexible work arrangement to allow her to work from home 5 days a week. Alisa is able to utilize laptops, soft phones and Jabber so that she is accessible to teammates, managers and other support staff. The technology tools allow her to be able to meet both the individual staff needs as well as business needs. Alisa has monthly one on ones with her manager via WebEx video conferencing and attends monthly team meetings via video conference as well.

Bobby is an exempt employee who works on the Data Analytics team for the Wexner Medical Center. A large part of his day-to-day work involves analyzing data and writing reports for his supervisor. Bobby lives about an hour away from campus and spends over 2 hours driving to and from work each day. Bobby has reliably demonstrated his ability to accomplish work tasks in a timely fashion and is both self-sufficient and self-motivated. To better support Bobby's work-life balance, his manager offered up the option for him work from home 3 days per week, using his University issued lap-top computer. He agreed this would be helpful and is able to join any necessary meetings via Skype for Business; however, he is strategic in that he schedules meetings that require his physical presence on Mondays and Fridays when he plans to be in the office. This arrangement has allowed the University to retain a talented staff member like Bobby, while also allowing Bobby the flexibility he needs to better balance his life.



Flexible Work Info Sheet



What is flexible work?

A work arrangement that falls outside of a unit's usual work schedule and lasts longer than two months. Ohio State supports flexible work arrangements to achieve a reliable and productive work environment that enables staff to balance work and personal needs.



Who can use a flexible work arrangement?

All Ohio State staff members are eligible to request flexible work arrangements. However, not all positions lend themselves to flexible work.



How do I know if I am eligible?

Discuss **Ohio State's Policy 6.12 Flexible Work** with your supervisor or your unit's human resources professional.



Where can I get more information?

For employees: Office of Human Resources website at go.osu.edu/flex-work

For managers and units: See go.osu.edu/flex-work-manager



THE OHIO STATE UNIVERSITY

Flexible Work Awareness

An overview prepared jointly by the
University Staff Advisory Committee and
President and Provost's Council on Women



Both USAC and PPCW advocate for awareness of Ohio State's Flexible Work Policy.

This presentation can be used by unit staff advisory committees and leaders of department staff meetings.



What is Flexible Work?

- A flexible work arrangement falls outside of a unit's usual work schedule and lasts longer than two months.
- Examples of flexible work arrangements include a compressed workweek, telecommuting or starting/ending times that change periodically.
- Flexible work arrangements are fully described in Policy 6.12 Flexible Work.



Why Flexible Work?

Workplace flexibility provides a way to successfully manage people, time, space and workload.



Who can use a flexible work arrangement?

All Ohio State staff members are eligible to request flexible work arrangements. However, not all positions lend themselves to flexible work.



How do I know if I am eligible?

To determine eligibility and feasibility of a flexible work arrangement for your position, please discuss the policy and specific process information with your supervisor or your unit's human resources professional.



What is the supervisor's role in flexible work arrangements?

- Per Policy 6.12 Flexible Work, supervisors should look for ways to implement flexible work in their units.
- Flexible work arrangements must be considered regardless of the reason for the request.
- Decision-making processes regarding flexible work arrangements must be transparent.



Other considerations in Policy 6.12

- Family and medical leave or a reasonable accommodation for a disability may be more appropriate than flexible work.
- Supervisors cannot take adverse action against staff for asking for a flexible work arrangement.



What are benefits of flexible work policies?

- 95% of companies said employee productivity increased or stayed the same after implementing flexible work arrangements ¹
- 95% of workers with flexible work arrangements said communication with their colleagues improved or stayed the same ²
- 60% of workers say they're more productive with flexible work arrangements ²
- 71% of Ohio State staff overall say their unit provides work-life balance. Rates at the college/VP unit level vary from 50% to 95%. ³

1 Society of Human Resource Management, 2016

2 Flex Strategy Group, 2018

3 Culture Survey, 2014



Where can I get more information?

For employees:

- Your supervisor or human resources professional
- Office of Human Resources website at go.osu.edu/flex-work
- USAC/PPCW flexible work toolkit at usac.osu.edu

For managers and units:

- See go.osu.edu/flex-work-managers
- Policy consultation with Employee and Labor Relations in the Office of Human Resources, 614-292-2800, email: hr-elr@osu.edu, web: hr.osu.edu/services/elr