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## **FlexTime Administrative Procedure**

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Administrative Procedure Number F\_ADM\_3  
Responsible Office Assistant Vice President for Finance & Controller  
Associate Vice President, Human Resources

### **Executive Summary**

#### **Administrative Procedure**

The managers within Financial and Accounting Services (FAS) may allow employees flexibility to schedule their work hours subject to conditions set forth in this administrative procedure document. Flextime permits variations in start and departure times for individual employees; hours may fall outside the standard 8:30 AM to 5:00 PM range, but Flextime does not alter the total number of hours worked in a workweek or the unit's ability to provide customer service during business hours. There must be sufficient staff in work status to continue to provide uncompromised customer service and coverage during core business hours, 8:30 AM – 5:00 PM Monday - Friday, for units that provide customer service. Flextime cannot create overtime or the need for additional funding. Lunch breaks, coverage during business hours, and the unit's business mission must be priority considerations when a flextime schedule is approved. Flextime may not be disruptive to FAS's ability to provide superior customer service to the institution. Flextime is a reward, not an entitlement.

#### **Reason for the Administrative Procedure**

Flextime scheduling is encouraged as a means to provide the best possible service delivery. Flextime can be mutually beneficial for the employee(s), FAS, and Wake Forest University. Employee(s) may have preferred hours of work which may contribute to their ability to work well and be more satisfied in their employment. Flextime is not telecomputing, telework, or flexplace. Flextime allows a work - life balance while accommodating the requirements of the department and unit.

## **Responsibilities**

### **FAS Managers**

FAS Managers (supervisors) have the authority to approve flextime work schedules, acting in the best interest of their units. The manager may publish an annual calendar and block days or peak periods when flextime will not be available (e.g. July for Financial Accounting & Reporting and Freshman Day and Registration for Student Financial Services). Managers must ensure that flextime is administered consistently and equitably within the unit, and that flextime arrangements conform to University Administrative Procedure, Department of Labor Wage and Hour regulation and the Fair Labor Standards Act. The manager must ensure that no individual employee abuses the flextime privilege. Managers must also ensure that sufficient staff is available to meet the operational requirements of the unit. The manager uses discretion when setting parameters for the unit's flextime schedule, including but not limited to coverage during business hours of 8:30 AM – 5:00 PM Monday through Friday, excluding University staff holidays. Managers must ensure that a contingency plan exists to deploy during unplanned absences, crises, or times of unforeseen business needs. Any variance from the agreed upon flextime schedule must be approved by the manager. Managers will resolve intradepartmental scheduling conflicts and assure that appropriate staffing is maintained.

### **FAS Staff**

FAS staff must plan his/her flextime schedule and recognize any limitations or restrictions when the use of flextime would compromise the continuance of superior individual and unit customer service and performance. FAS Staff must adhere to the flextime schedule once it is approved by the manager. Staff must seek and receive approval from the manager before deviating from the approved flextime schedule.

#### **Primary Guidance**

Flextime is offered, during a pilot period fiscal year ending June 30, 2010. Flextime will be evaluated after the pilot period before any permanent decision or administrative procedure is approved or finalized.

#### **Responsible University Office or Officer**

Assistant Vice President for Finance & Controller and  
Associate Vice President, Human Resources.

#### **Who Is Governed By This Administrative Procedure**

Flextime applies to regular full time exempt and nonexempt staff of FAS.

#### **Who Should Know This Administrative Procedure**

All staff of FAS should know this administrative procedure. Should flextime become an approved administrative procedure, then it will be posted on the FAS web site. Flextime must be transparent to the customers of FAS by not compromising customer service.

#### **Exclusions & Special Situations**

Employees participating in Flextime scheduling must maintain a "Met Expectations" or better on the Annual Performance Review and may not be on a

Performance Improvement Plan. Flextime work options are possibilities, not entitlements, and as such may be constrained by factors such as the nature of the work to be performed, productivity, federal and state legislation, restrictions of funding sources, task interdependence, and other operational constraints.

**Pilot Period**

Flextime was piloted solely for the FAS staff for a specified period. Each operational unit piloted and evaluated the use of flextime during the trial period, beginning with the effective date of this pilot administrative procedure and ending June 30, 2010.

**Highlights of Revisions, by Date**

01/31/2011: removed “(Pilot)” in title and document’s footer

01/31/2011: added clarity to “Administrative Leave” section and related scenarios

## *Administrative Procedure*

Financial & Accounting Services (FAS) rewards its exempt and nonexempt staff with the possibility of flextime. Individual units and/or employees within FAS may use a flextime work schedule subject to the following conditions:

- The normal workweek shall continue as a 5 day, 37.5 hour, workweek for all employees (typically Monday through Friday).
- Scheduled lunch break must be at least thirty (30) minutes in duration.
- Each unit's manager will ensure coverage during core business hours and peak periods of operation in order to maintain uncompromised customer service and achievement of the unit's business mission.
- Each unit's manager will be responsible for resolving intradepartmental schedule conflicts and assuring that proper coverage is maintained.
- Each unit's manager may, at his/her sole discretion, implement, continue, or discontinue flextime work schedules for an individual or for the unit. At the sole discretion of the manager, an employee may be re-assigned to work core hours at any time. Any abuse of the flextime administrative procedure may result in a suspension of the flextime schedule, either permanently (for an employee) or temporarily, and will be reflected in the employee's performance review.
- The computation of the accrual and usage of Paid Time Off and Holiday pay and other similar benefits is the same for employees working flextime as for those working a standard schedule.

The success of flextime depends entirely upon the cooperation and good faith efforts of all parties involved, and on a mutual understanding and acceptance of the benefits and limitations of flextime. Management must be open to alternative and creative approaches to the scheduling and accomplishment of work, while employees must fulfill their commitments in a trustworthy and productive manner for flextime to succeed.

## Table of Contents

	Page
Executive Summary .....	1
Administrative Procedure .....	1
Reason for the Administrative Procedure .....	1
Responsibilities .....	2
FAS Managers .....	2
FAS Staff .....	2
Primary Guidance .....	2
Responsible University Office or Officer .....	2
Who Is Governed By This Administrative Procedure .....	2
Who Should Know This Administrative Procedure .....	2
Exclusions & Special Situations .....	2
Pilot Period.....	3
Highlights of Revisions, by Date .....	3
Administrative Procedure .....	4
Related Policies.....	5
Related Documents .....	5
Procedures.....	6
Minimum Standards and Fundamental Principles Supporting our Core Mission .....	6
Flextime Schedule and Approval Form .....	6
Accrual and use of benefit hours .....	7
Administrative Leave.....	7
Eligibility .....	9
Definitions.....	9
Contact(s).....	10
Web Address for Administrative Procedure .....	10
Appendix and Forms.....	10

### **Related Policies**

Variable Work Schedule, <http://www.wfu.edu/hr/policies/III-2.pdf>

Administrative Leave and Release Time, <http://www.wfu.edu/hr/policies/X-11.pdf>

Paid Time Off (PTO), <http://www.wfu.edu/hr/policies/X-4.pdf>

Inclement Weather and Other Unusual Conditions, <http://www.wfu.edu/hr/policies/X-13.pdf>

### **Related Documents**

Flextime Schedule and Approval Form

## **Procedures**

Flextime was offered on a trial basis and was evaluated after the pilot period concluded. The pilot period concluded on June 30, 2010 at which time the FAS Leadership chose to adopt the administrative procedure with continued evaluation and monitoring.

When scheduling flextime, the employee, manager, and unit manager must plan ahead to incorporate departmental events, meetings, and work requirements that impact the use or availability of flextime. Employees shall be responsible for attending all mandatory department meetings and training. Employees shall be expected to attend such events even if the meeting or training is scheduled at an “off” time, unless otherwise approved. Examples include but are not limited to Finance All Hands meetings, FAS All Staff meetings, and unit staff meetings. (The employee and manager must plan accordingly such that attendance during mandatory events does not cause one’s hours worked to move into overtime status.)

The unit manager has the discretion to determine if staffing coverage is adequate and sufficient to meet the operating requirements of the unit. And as such, the manager may, at his/her discretion, implement, continue, discontinue or modify flextime work schedules. At its discretion, the unit’s management has the right to return an employee to a standard work schedule.

It is important to remember that the level of service must be maintained during core hours. Therefore, managers will need to coordinate the schedules of all flextime participants to ensure coverage during these hours.

Support services that are extraneous to FAS, e.g. Information Services and Finance Services, adhere to the core hours of the University, 8:30 AM – 5:00 PM, Monday through Friday. Flextime Schedules outside of these core hours have risk of unsupported services.

### **Minimum Standards and Fundamental Principles Supporting our Core Mission**

When working a flextime schedule, we must maintain the fundamental principles that govern our position responsibilities, customer service, unit priorities, and departmental mission and address them accordingly. Participants’ performance may not be impeded due to working a flextime schedule. Position responsibilities and superior customer service must be the primary focus. The FAS Leadership Team, in collaboration with the staff, crafts the following principles:

- Establish and maintain a sustainable back up program, either via a “buddy system,” generalist/specialists, or other means.
- Define each unit’s core mission that supports the department and the university.
- Define response time for each unit.

### **Flextime Schedule and Approval Form**

To participate in a flextime schedule, an employee must complete the Flextime Schedule Approval Form and secure the manager and unit manager’s approval.

A flextime schedule, once agreed upon by the unit manager, should remain stable, except when a special employee or business need arises. Emergency situations which require schedule modification may be accommodated.

Flextime must be pre-approved by the employee's immediate manager and unit manager. Completion of the Flextime Schedule along with the approval signatures is required. Any deviation from the approved flextime schedule must be pre-approved by the unit manager. Any overtime as a result of not exercising the flextime schedule must first be approved by the unit manager.

### **Accrual and use of benefit hours**

Accrual of Paid Time off (PTO) and the use of Holiday pay and other similar benefits are not impacted by the use of flextime. The intended use of PTO and Holiday pay is to replace one's scheduled work hours with the benefit hours such that the paycheck will be whole. Eligible staff employees accrue PTO hours based on their job classification, appointment effort (FTE) or hours paid each pay period (non-exempt employees), and years of service. See Paid Time Off policy, <http://www.wfu.edu/hr/policies/X-4.pdf>.

An employee can use PTO for as many hours as s/he is scheduled to work. For example, a person scheduled to work 9 hours one day can take up to 9 hours of PTO on that day. PTO cannot exceed the amount of scheduled work hours in a particular day. (A person cannot use 9 hours of PTO when scheduled to work 7.5 hours in order to work fewer hours on another date.)

The sum of work (service) hours and holiday hours paid during a week with a holiday must equal the total number of hours worked in a normal week. Staff scheduled to work on a holiday is credited with one workday of holiday pay (7.50 hours for an employee working 37.50 hours per week). If the holiday occurs on a day when the employee is not scheduled to work, due to the preapproved flexible work schedule; then the employee is considered to have taken the holiday and will be paid accordingly. Any shortfall must be covered by PTO (or Leave Without Pay when the PTO balance has been depleted). Any exception must be preapproved by the supervisor. Managers have the option of adjusting an employee's work schedule for the week to include scheduled holidays as regular work days.

### **Administrative Leave**

When the University announces a delayed opening, early departure, or closing due to inclement weather or other reason, Administrative Leave and thus an employee's arrival and departure time will be based on the university and department's standard work schedule (8:30 a.m. – 5:00 p.m.). The total number of hours worked and administrative leave cannot exceed 7.5 hours per day based on a 1,950 hour/year employee. An employee is eligible to take PTO to cover the additional hours that he or she was scheduled to work that day or make up the missed time later during that week with the supervisor's approval. Due to safety considerations, always use prudent judgment when administrative leave is related to an inclement weather event.

The following scenarios, while not all inclusive, may better explain.

*Scenario 1:* The University opens at 10:00 a.m. An employee was scheduled to work 7:30 – 5:00 and they work 10:00 – 5:00. They are eligible for 1.5 hours of administrative leave plus 6 hours worked. The employee can take PTO for the additional time they were scheduled to work.

*Scenario 2:* The University opens at 10:00 a.m. An employee was scheduled to work 7:30 – 5:00 and they work 9:00 – 5:00. They are paid for 7 hours worked and .5 hours of administrative leave. They can take PTO for the additional time they were scheduled to work.

*Scenario 3:* The University closes at 4:00 p.m. An employee was scheduled to work 7:30 – 3:00. They are paid for the 6.5 hours worked and do not receive administrative leave.

*Scenario 4:* The University closes at 4:00 p.m. An employee was scheduled to work 8:30 – 5:30. They are eligible for 1 hour of administrative leave. They will be paid 6.5 hours worked plus 1 hour admin leave. The employee can take PTO for the additional time they were scheduled to work.

*Scenario 5:* The University closes at 4:00 p.m. An employee was scheduled to work 8:30 – 5:30. They work until 4:30. They will be paid .5 hours of administrative leave and 7 hours worked. The employee can take PTO for the additional time they were scheduled to work.

*Scenario 6:* The University closes for the entire workday. An employee was scheduled to work 8:30 – 12:00. The employee is paid 3.5 hours of administrative leave.

*Scenario 7:* The University closes for the entire workday. An employee was scheduled to work 7:30 – 5:00. The employee is paid 7.5 hours of administrative leave and must use 1.0 hours of PTO for the additional time they were scheduled to work or work an additional hour during the week, as approved by the supervisor.

*Scenario 8:* An employee's flextime schedule approves arrival at 9 AM and the campus delays opening for two hours, then the employee must arrive for work at 10:30 AM and record 1.50 hours of Administrative Leave, whereas, an employee with 8:30 AM arrival must arrive for work at 10:30 AM and record 2.0 hours of Administrative Leave (the employee does not arrive for work at 11 AM and record 2.0 hours of Administrative Leave).

*Scenario 9:* An employee's flextime schedule is approved for his/her departure at noon. The campus closes at noon for inclement weather and awards Administrative Leave beginning at noon until the end of the normal work day. The employee is paid for hours worked and is not entitled to Administrative Leave.

*Scenario 10:* An employee's flextime schedule is approved for not working Friday. On Friday, the campus closes and awards Administrative Leave. The employee is not entitled to Administrative Leave.

*Scenario 11:* An employee is scheduled to arrive for work at 8:30 AM and begin PTO at noon. At 3 PM, the University awards Administrative Leave to begin an early holiday. The employee records hours worked, and PTO. The employee is not entitled to Administrative Leave.

*Scenario 12:* An employee is scheduled to not come to work due to his/her flextime schedule. The campus does not open, i.e. closes without opening, typically due to inclement weather. The employee is not entitled to Administrative Leave.

*Scenario 13:* An employee's flextime schedule approves departure at 4 PM. The Controller closes the office at 3 PM. The employee is entitled to 1 hour of Administrative Leave.

## **Eligibility**

To be eligible for flextime, an employee must maintain a satisfactory rating on his/her annual or probationary performance reviews, must not be on a Performance Improvement Plan, and must be actively employed as staff in the department of FAS.

## **Definitions**

*Core business hours:* Pre-specified times of the day when the unit must have adequate coverage to provide customer service internally and to the university community. Work status hours may or may not be required in a specific unit that does not provide customer service, depending upon the nature of work performed or the level of service to be maintained. As a general rule, Financial & Accounting Services' core business hours are 8:30 AM – 5:00 PM, Monday through Friday. The core business hours are deemed the peak hours for customer expectations of service delivery and availability. The standard workweek, as defined by Human Resources based upon employee class is 37.50 hours per workweek, Saturday through Friday, remembering the core operating hours are 8:30 AM – 5:00 PM, Monday through Friday.

*Flextime:* A system of varying employee work time, in which each employee will work the same number of hours as s/he would during a typical schedule, but the timing of hours worked will vary by mutual agreement between an employee and his/her manager within the established Flextime guidelines. Flextime is an alternate work schedule by which an employee may work within specific limits dictated by the needs of the job and is subject to management review and approval.

*Flexplace:* A system of varying employee work location outside of the normal work site. That is, a workplace other than the FAS office or work area of Wake Forest University (e.g. home, hotel, café, or other remote site).

*Telecomputing:* A generic term for using computers for communication (e.g. computing remotely via telephone or internet connection) that facilitates working from a remote site during hours when not in work status at the normal work site.

*Telework:* Working from a remote location, using telecomputing services.

*Unit manager:* Leadership team member.

**Contact(s)**

Assistant Vice President for Finance & Controller, 336-758-5233.

**Web Address for Administrative Procedure**

<http://www.wfu.edu/fas/policies/index.html>

**Appendix and Forms**

Flextime Schedule and Approval Form