Life/Works Task Force Recommendations for OSU Extension Administration

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THE OHIO STATE UNIVERSITY

COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES

Charge

The Life/Works Task Force will provide specific recommendations for creating actionable life/work policies, procedures, and organizational supports to enhance the well-being of OSU Extension professionals.

1) Life/work balance defined from the perspective of the Extension employee.

An individualized assessment by the employee on how their work and life intersect in a balance that is impacted by co-workers, health considerations, finances, family concerns, leadership/supervision, and perceptions of support, growth, and involvement.

In addition, life/work balance is the ability to pursue both personal and professional priorities with minimal role conflict or role strain. For example, an Extension employee with good life/work balance would feel capable of being a good parent and a good employee at the same time.

The Life/Works Task Force acknowledges that there is no one way to achieve life/work balance; approaches will differ based on individual needs and job responsibilities. For some, the ability to have flexible work hours may promote life/work balance and job satisfaction. For others, regular, structured working hours may provide a needed boundary between work and home.

2) Life/work goals to be considered for the organization.

The Life/Works Task Force believes it is critical for Extension professionals to have *clearly communicated expectations* that are *consistent across the organization* and *realistic* (given reporting requirements, stewardship expectations, training requirements for learning new technology and processes*, etc.) regarding the number of hours one is to work each week and the number of programs one is to schedule each week, month or year, based on FTE and hours worked in each performance period. If an employee needs to take family or medical leave, the expectations would be adjusted or prorated accordingly. These expectations would (1) allow each individual to appropriately and effectively use professional scheduling and flexible work arrangements to support their personal life/work balance, and (2) contribute to an organizational culture that is supportive of life/work balance.

*One task force member expressed concerns over Workday shifting processes that have traditionally been handled by support staff to educators and administrators. Pertinent to this report, the shift could disrupt the life/work balance of content experts by taking time away from what they were hired and trained to do. At the same time, the shift seems to be a poor use of the expertise of both parties and may threaten the job security of support staff.

The Task Force also believes it is critical for OSU Extension administration to strive for and model life/work balance, and to develop an organizational culture that recognizes and supports the unique life/work needs of every employee. Key elements of this culture may include:

- **Flexibility** - Flexibility to create your own schedule and get your work done, whether that means flexing out full days to make up for heavier days, or taking time during normal working hours to tend to home or family responsibilities or self-care.

- **Consistency** - Consistency across the state and program areas regarding how we define and measure productivity and impact, as well expectations for programming and how we are to work together.

- **Trust** – Assuming the best in peers and direct reports unless there is a reason to suspect otherwise. Supervisors and support staff need to trust that employees are working when they say they are working, regardless of work location, and not de-value work that occurs at home as opposed to in the office.

- **Health and Wellness** – An organizational emphasis on social, emotional, and physical wellbeing modeled by our leaders and colleagues. This may include:
    - Limiting time spent with technology (Zoom free days, limiting the length of Zoom meetings, limiting email after business hours, etc.)
    - A focus on being active
    - Serving nutritious foods at events hosted by the organization
    - A willingness to collaborate with colleagues
    - Participation in Your Plan for Health (YP4H) activities
    - Use and understanding of the Employee Assistance Program (EAP)
    - The allowance of sabbaticals by educators and faculty to study specific topics
    - Taking vacation and time off as a key practice
    - Taking sick time and leave when needed

3) Supports needed for life/work balance in Extension.

First and foremost, the Life/Works Task Force believes the culture of Extension needs to change to support life/work balance.

In their article published in the Journal of Extension, Harder & Narine quote Sir Richard Branson, billionaire founder of the "wildly successful Virgin Group empire" as saying "Put your staff first, customers second, and shareholders third". In the same vein, Dr. Lisa Washburn from University of Tennessee Extension warns against the faulty thinking that Extension professionals need to be all things to all people at all hours of the day. As human beings, we have limitations and need to care for ourselves to best meet the needs of our clientele. This entails setting boundaries and turning the mission

of OSU Extension inward – to use research-based education to strengthen our own lives and communities. OSU Extension professionals should feel supported in their decisions to focus on quality of programming over quantity, and know it is okay to say "no" or "not right now" when at capacity.

The Life/Works Task Force also believes we need role-modeling at all levels of leadership, training for employees, supervisors and mentors, consistency, accountability, coaching and mentoring with empathy, and understanding that each individual situation is unique to support the life/work balance of every Extension professional. Task Force members compiled the following attributes of supervisors who support the life/work balance of their direct reports:

- They take time to get to know and establish mutual trust with their employees.

- They work to establish realistic expectations with their employees.

- They check-in with their employees regularly to ask how things are going and encourage employees to adjust their workloads when needed.

- They encourage the use of vacation time *before* their employees start to feel overwhelmed.

- They are supportive of their employee's needs to take time off. When employees take time off, they are not expected to do work while away, and there are no consequences associated with the time taken. When extended leave is taken, expectations are adjusted accordingly, and employees are not penalized for taking personal or family leave.

- They allow for flexible work hours to accommodate personal schedules and needs.

- They allow employees to work off-site and/or utilize the "do not disturb" settings online on occasion, and they do not de-value work that is completed outside of the office.

- Some supervisors make it a point to avoid sending emails outside of business hours. Those who do "catch up" on email outside of business hours communicate to their employees that they are flexing their time by attending to personal needs during the day and "catching up" at night, and they do not expect replies to messages sent after hours until the next business day.

- They do not expect immediate replies to email and will call or text if something urgent comes up.

- They share calendars and promote the communication of schedules amongst the staff members in each county of unit. As such, they do not question where employees are/why they are not in the office when employees are not physically present unless there is reason to suspect that someone is "missing".

- They encourage regular breaks (lunch, snack, stretch, movement, etc.) throughout the day.
- They model life/works best practices by taking regular vacation time and time away from email (i.e. they don't check email when on vacation!) and by flexing time to attend to personal and family responsibilities.

These attributes are not exhaustive. As a Task Force, we simply wish to share examples we have observed and experienced in our supervisors that could be shared with other supervisors within Extension to highlight model practices in action.

As noted in this list of practices, the Task Force recommends that supervisors regularly ask about the life/works needs and practices of their employees during performance reviews and check-ins. Regular, proactive conversations about life/works needs and expectations would help employees hold themselves accountable to their own life/works intentions, as well as reinforce an organizational culture that promotes life/works balance.

4) Practices that would promote optimal life/work balance in Extension.

The Life/Works Task Force believes that all Extension employees need supervisors and mentors who (1) model Life/Works best practices, (2) clearly communicate programming expectations that are consistent across the organization, and (3) encourage and expect employees to allocate time in their schedules for program planning and "deep work". Deep work is a term coined by Cal Newport, a Computer Science professor from Georgetown University who wrote a book by the same title. Newport defines deep work as the ability to focus without distraction on a cognitively demanding task. Within Extension, much of the work we do on a daily basis (reading and responding to emails, attending Zoom meetings, completing trainings, etc.) is shallow work. Deep work requires blocks of time, designated space, focus and solitude.

As a Task Force, we recommend that every employee – educators, program assistants and support staff, too - regularly block out chunks of time on their Outlook calendars for deep work. The amount and frequency of designated deep work time may vary from one individual to another; for example, deep work time seems to be especially needed by educators. However, we believe that every employee should be allowed and encouraged to designate "Zoom free" days for themselves and take time away from email and the phone to allow for deep work.

In addition to encouraging deep work, the Task Force recommends that mentors and supervisors encourage employees to leave time in their schedules for emergent tasks. For example, a full-time employee might be encouraged to schedule 32-hours of work per week and leave 8 hours of margin for emergent tasks so they don't regularly work over 40 hours/week.

Other practices the Task Force believes would promote Life/Works balance in Extension include:

- Less frequent and shorter meetings. When feasible to replace a meeting with email communications, the meeting should not happen. It is simply not possible for employees to achieve life/work balance when they are expected to attend multiple meetings during regularly scheduled work hours while also delivering programs – often on weekends and evenings – as well as keep up with required reporting, training and stewardship responsibilities.

    o The Life/Works Task Forces recommends that both in-person and virtual meetings be kept to 45-minutes instead of a full hour so that attendees can take a mental and physical break between commitments. Meetings, trainings, and events that need to last longer than 60 minutes should incorporate a planned break each hour.

- An organizational policy or best practice discouraging emails from being sent outside of standard work hours, accompanied by training on how to schedule emails in Outlook. In addition, clear and consistent communication from supervisors and administrators regarding expectations related to email would help alleviate pressure to read and respond to messages at all hours every day of the week. While the Task Force believes that an organizational policy to discourage messages from being sent overnight and over the weekend would go a long way, we also recognize that some employees practice life/work balance by tending to personal or family responsibilities during standard hours and "catch up" late in the evening or over the weekend. In these scenarios, if an employee neglects to schedule an email and instead sends in real time, the recipient should know that they are not expected to respond in real time, too.

- The provision of tools and equipment, accompanied by training on how to use them, to work efficiently without the need or temptation to use personal devices for work purposes.

- Permission and support for closing offices during lunch and/or when there is not sufficient coverage to keep the office open eight hours a day, five days a week. Keeping the office open at the cost of requiring support staff to work through lunch, forgo breaks or complete tasks such as going to the bank on personal time, or consistently/regularly asking educators to put in extra time to cover the office in their absence, does not promote the life/works balance of either party.

- Accountability groups or partners for OSU Extension professionals, or a system to hold employees accountable to their hours. While salaried employees are not expected to track their hours, tracking hours periodically could reveal habits (an AHA! moment of sorts) and provide an opportunity for supervisors, peers and individuals to hold themselves/one another accountable if they are consistently working overtime.

- An examination of the existing expectations and accountability with regards to state-wide education and service for Extension Educators (meeting the percent of effort for state-wide issues).

- Policies and procedures to change the existing culture in which additional assignments are continually given to top performers (i.e., the busy become busier). Specialized assignments should be analyzed in context of life/work balance. Previously state team leaders were provided with a 50% program assistant to help redistribute the workload; this is especially important for county-based educators who are asked to take on special assignments or team leadership.

- The elimination of stewardship roles that require employees to volunteer their time to fulfill responsibilities. For example, the legislative stewards in levy funded counties are expected to complete all levy related activities on their personal time.

- A culture which promotes a "If I say YES to your request, I must say NO to this other activity" discussion between supervisor and employee as consideration is made to unplanned requests in an employee's plan of work for a given year.

5) Professional development, support mechanisms, and tools to enhance life/work balance.

In general, the Life/Works Task Force believes that professional development to support life/work balance should emphasize hard skills, not soft skills. Examples include:

- How to use flexible work policy 6.12.

- How to submit a telework agreement and when/how to update it.

- How to determine if telework is right for you (e.g. do you have an ergonomic home workspace? Fewer distractions at home than in the office? Adequate technology? Have you considered and discussed with your supervisor your community's perception of telework?)

- How to effectively use the tools available to OSU employees (e.g. Microsoft Teams, Outlook, OneDrive, OneNote, etc.) to decrease the workload and not increase it. In addition, effective use of available tools should discourage employees from using personal devices for work purposes.

- How to schedule emails in Outlook so they are not sent after business hours.

- How to share your Outlook calendar with your supervisor and office mates, and the importance of sharing calendars with one another. One support staff member of the Task Force commented that it is incredibly helpful to have access to calendars when scheduling appointments and determining how to best serve clients when they call or come in. In addition, having direct access to calendars could cut down on the number of emails and phone calls needed to schedule appointments, which would benefit programming staff, too.

Soft skills trainings that could be made optional to employees to potentially support life/work balance include time management training and training on how to set priorities and let go of tasks or programming when at capacity.

An additional mechanism to support the life/works balance of Extension employees is the streamlining of reporting and evaluation systems to ensure that required reporting does not require duplicity of efforts. Although this shift may require more work up front (for example, Extension professionals may be expected to input data in VITA weekly or monthly), clearly communicating this expectation and holding employees accountable to it could save them unnecessary time and effort later. If regular reporting happens on a continual, consistent basis, impacts and numbers could be obtained from the online reporting system on an as-needed basis for special reports, and supervisors could use this data instead of requesting other reports from employees.

6) Describe how would you recommend expanding the partnership and organizational awareness with the OSU Employee Assistance Program and Your Plan for Health.

The Life/Works Task Force recommends utilizing Buckeye Wellness Innovators (BWIs) within Extension to promote Buckeye Wellness programs and resources to their peers.

BWIs apply to serve as innovators and complete training in order to effectively promote university-wide wellness initiatives and the One University Health and Wellness strategic plan by:

- Communicating health and wellness activities to their colleagues
- Encouraging and motivating colleagues to participate in wellness initiatives
- Planning and conducting wellness activities
- Working collaboratively with the Office of the Chief Wellness Officer, Buckeye Wellness, Your Plan for Health and the OSU Health Plan to promote health and wellness

More information is available about this program at https://wellness.osu.edu/buckeye-wellness/buckeye-wellness-innovators. Ideally, we recommend at least one BWI per area to communicate updates and opportunities from Buckeye Wellness and serve as a captain for university-led challenges such as the Hit the Road with the Buckeyes challenge. The BWI program is a free professional development and service opportunity that area leaders could promote to employees who may be interested in serving the organization in this capacity.

The following table lists current BWIs within Extension. In addition to these individuals, there are at least 12 other BWIs within the college including HR professionals and members of the CFAES leadership team.

Name	Location
Robin Adams	Mahoning County
Carolyn Badenhop	Henry County
Lisa Barlage	Ross County
Pat Brinkman	Fayette County
Patty Corfman	Ag Admin Bldg.
Marie Economos	Trumbull County
Shari Gallup	Licking County
Whitney Gherman	Marion County
Misty Harmon	Perry County
Sally Hennessey	Lorain County
Margaret Jenkins	Clermont County
Jenny Lobb	Franklin County
Lori Now	Auglaize County
Carol Smathers	Campbell Hall (FCS state office)
Laura Stanton	Warren County
Michelle Treber	Pickaway County
Courtney Woelfl	Cuyahoga County

7) Provide input on the following policies and procedures intersecting with life/work:

  a) **Professional scheduling**
  b) **Flexible work agreements (options for flexible schedules such as 4-day week, staggered starts, etc.**

  Professional scheduling and flexible work arrangements have been made available to many Extension professionals by their supervisors due to high demand for evening and weekend programming. The Life/Works Task Force recommends continuing these options as a means to promote life/work balance, and to accompany them with clearly communicated, consistent expectations regarding the number of hours one is to work each week and the number of programs one is to schedule each week, month or year. In addition, the Task Force recommends that supervisors support flexible work and professional scheduling by not expecting employees to be present in the office during regular office hours every day of the week (supervisors have calendar access and can see if/when flexibility is needed due to weekend and evening programs), and not assigning lesser value to work that is completed at home instead of in the office. As a rule, when employees are not in the office during office hours, supervisors should assume they are either out programming or flexing their time rather than abusing a policy – though they can check calendars or check in with employees as needed to confirm.

c) Telework (now and beyond COVID)

In June, 85% of respondents to the readiness to return to the office survey indicated they would choose to continue working from home if given the opportunity. Qualitative responses to the survey indicated the ability to continue to telework may be extremely beneficial for some and a challenge for others. For example, some employees reported improved mental health, productivity and focus while working from home – an unanticipated consequence of being away from gossip and distractions associated with the office environment. In addition, the removal of a daily commute provided some employees with significantly more time to spend with family or in self-care activities. For others, however, the lack of reliable technology, adequate workspace and supplies and/or the presence of children or other distractions at home made telework more challenging and stressful than working in the office.

As a Task Force, we recommend providing employees with a checklist of factors to consider prior to entering a telework agreement to determine if potential benefits associated with telework would outweigh challenges. In addition, we recommend that employees discuss potential implications of telework with their supervisors to ensure that telework would not decrease the impact of their unit, and to proactively address community perceptions of telework.

At minimum, we recommend providing employees the option to telework at least one day each week to accomplish large tasks such as writing without the distractions associated with being in the office. For positions that do not involve programming or in-person interactions with clientele (positions within the publishing unit or business office, for example), we recommend these employees be given the option to telework permanently if desired.

To obtain further recommendations related to telework, we recommend consulting the team in the ACEL department led by Jerry Thomas that is looking at remote work in Extension. Per an email we received from Jerry on December 18, a preliminary literature review by his team revealed "a large majority across most industries intend to keep some part of telework and have a "hybrid" program" post-COVID-19, and preliminary non-representative surveys of Extension professionals have revealed the same preference for hybrid work.

Finally, as an alternative to professional scheduling, flexible work and telework, the Task Force recommends the Results Only Work Environment (ROWE) approach to workplace management. Unlike flexible work and telework, the ROWE approach involves no default work setting or standard work hours. Instead, it emphasizes autonomy and accountability, and prioritizes performance, outcomes and results over hours worked.

8) Identify 3-5 specific life/work questions to be incorporated into solicited feedback for our strategic planning process, which begins in January.

In November, David sent a survey to all OSU Extension ANR professionals asking the following questions:

1. What is your job title?
2. How satisfied are you with regards to YOUR current life/work balance?
3. In your opinion, how many hours of work should be expected per week for a full-time employee?
4. What specific policies, procedures, or standard operating procedures could OSU Extension implement (or continue) to support optimal life/work balance?
5. What other comments or suggestions do you have for the Life/Works Task Force?

We recommend replicating this survey for each program area as well as for support staff. In addition, we recommend asking the following questions:

- How many years have you worked in Extension?
- What do you view as top barriers to having proper life/work balance?
- What would you change about the organization's culture that could help improve life/work balance?
- What training or tools do you need to achieve life/work balance?

9) Indicate what you think would be some valuable potential metrics for measuring life/work balance in Extension.

The Life/Works Task Force liked the examples provided by Jackie Wilkins:

- scores on subjective responses to life/work balance items in surveys, such as:
  - How satisfied are you with your life/work balance?
  - How much control do you believe you have over your own life/work balance? (No control / A little control / A great deal of control / Complete control)
    - As a follow-up… If you selected No, or a little control, indicate why this is the case… or indicate who you feel has the most control (could be a name, a position, or the organization)
  - Have you missed personal events because of work?
- number of employees using flexible work schedules, based on need.
- number of employees telecommuting.
- number of hours employees use technology for attending meetings or working remotely.
- number of hours spent per day or per week in overtime (Over 40 for hourly and over 45 for salary)

- number of hours of spent on work-related communication after workhours, and on weekends and holidays
- number of hours employees spend on commuting to and from work
- any de-stressing time or space made available to employees for the use exercise, yoga, meditation, or general relaxation.

To add to the metric "number of hours spent using technology", Task Force members added "number of hours attending Zoom meetings" and "number of Zoom meetings that could have been emails". We also suggest measuring the reverse: number of Zoom free days and number of 2+ hour meeting-free blocks for deep work or professional development.

10) Identify possible tools to track life/work balance indicators over time.

The Life/Works Task Force liked the examples provided by Jackie Wilkins:

- GEP - Life/Work Balance Indicators at: https://sfgov.org/dosw/gep-work-life-balance-indicators
- University Culture Survey—Availability requested
- PHA aggregated data —Availability requested

Additional suggestions include:

- Vacation days taken by employees each month/quarter
- Sick days taken by employees each month/quarter
- Number of lost vacation hours by job classification
- Number of hours spent on Professional Development
- Dollars Invested in Professional Development
- County budgets and number of staff vs. population
- The metrics listed at https://worklifebalancecentre.org/how-to-measure-work-life-balance/
  - Career satisfaction
  - Organizational commitment
  - Job performance
  - Absenteeism
  - Employee turnover
  - Retention of employees

We also like the idea of a dashboard - much like the COVID-19 dashboard currently in use by the University - that would utilize ongoing pulse survey results to indicate the state of life/work balance in Extension at any given time, and to track trends and changes over time.