

Professional Scheduling for UF/IFAS County Extension Faculty, CEDs, RSAs, and SSAs
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From the Office of the Dean for Extension

Introduction

County, Regional, and State Extension Faculty (herein referred to as “Agents,” including County Extension Directors) are *professionals* and therefore are exempt from the overtime provisions of the Fair Labor Standards Act. Agents are charged with extending the educational mission of the land-grant university to the people of Florida. Cooperative Extension is a service-driven profession, so Agents serve the public when and where they are. Often the availability of these clients and/or the nature of the programs do not coincide with an 8 AM to 5 PM workday. Consequently, Agents often work during hours other than 8 to 5 to best serve the public and the IFAS mission. Lunch hours, evenings, and weekends are often the most opportune time to provide educational programs. Agents need to be flexible to schedule these peak times to enable successful educational programming. However, it is also desirable that employees achieve a balance in work, home, and community life.

In general, Agents are given autonomy and flexibility to do their jobs. However, to most effectively manage the unit, supervisors need to be aware of an Agent's professional schedule especially as it deviates from regular work hours. In UF/IFAS Extension, the Agent is responsible for setting his/her own schedule and reporting it to the Agent's supervisor. Professional scheduling should also include *personal time*, because actually scheduling personal time is a major key to successful professional scheduling.

The term "work-life balance" has evolved to "work-life blend." In today's electronic age of smartphones and tablet computers, Agents are rarely completely separated from their work. Consequently, Agents cannot always consistently separate their work demands from their personal life; rather, Agents must often blend the two.

Due to the visible and public nature of extension work, professional scheduling should consider the public image impact of taking personal time at certain sensitive times such as Monday morning, Friday afternoon or days before or after holidays. Using professional scheduling during these times is not prohibited, but scheduling consideration should be taken even if one's work and personal balance logically support taking personal time (as opposed to vacation time) during these sensitive periods.

UF/IFAS Extension Administration believes professional scheduling can be sufficiently managed by Agents, particularly following mentoring by supervisors, experienced faculty, and the Agent's own experience.

UF/IFAS Extension Professional Scheduling Policy

Definition. Professional scheduling is the responsibility of an Agent to control his/her schedule to best meet the needs of clients while achieving a balance between professional and personal time that is healthy for the organization and the individual. Professional scheduling refers to job duties fulfilled outside of normal work hours balanced with personal time taken during normal work hours.

Principle. Extension faculty are expected to meet their work objectives and, as professionals, are entrusted with the flexibility of balancing their work schedule.

Situation. The charge of the Extension Agent is to extend the educational mission of the land-grant university to the people of Florida. Professional Extension faculty positions are not defined or limited to a specified number of work hours per day or week. Extension is a service-oriented profession. Often, the availability of clients and/or nature of the program dictate the need for Extension employees to work during non-routine office hours. In addition, County Extension offices need to be sufficiently staffed to serve the public during established office hours per government expectations. Thus, an Extension professional's responsibilities typically take more than 40 hours per week and often occur during non-routine office hours. Professional Extension faculty do however accrue a generous number of vacation and sick leave days as well as a generous number of holidays.

Characteristics of Professional Scheduling. The following characteristics of professional scheduling are intended to give a sense of the nature of professional scheduling privileges this policy is intended to provide.

- When an Agent takes professional scheduling during normal work hours (8 AM to 5 PM), the Agent is on his/her own personal non-work time.
- When an Agent is working during what normally would be his/her own time outside of 8 AM to 5 PM, the Agent is at work.
- Professional scheduling is not designed to compensate for overtime hours or days worked, since Agents do not have defined work hours and are exempt from the overtime provisions of the Fair Labor Standards Act.
- Professional scheduling is not the same as "flex time" since Agents do not have defined work hours.
- Professional scheduling is not intended to reduce the total hours an individual works, but rather to make the hours they do work more productive and at the same time make the hours they are not working yield greater personal benefits.
- Professional scheduling is a privilege that can be revoked by the Agent's supervisor if abused or irresponsibly managed. Appeal of this decision can be made to the next level of supervision.
- Professional scheduling is not an issue tied to performance appraisal unless abuse results in unsatisfactory or poor program performance or improper personal conduct that disrupts the office professional environment.

- Professional scheduling is intended to allow individuals to control their schedules to best meet the needs of clients, while achieving a balance in work and personal time that is healthy for the individual and beneficial to UF/IFAS Extension.
- The responsibility of the County Extension Director (CED) is to support a work schedule environment that encourages healthy and well-balanced Extension faculty. Excessive work time commitments by an Agent, either imposed by the Agent or others, should be reviewed from a programmatic standpoint.

Policy and Implementation. In order to facilitate equitable and uniform professional scheduling system-wide, the following points serve as guides:

1. Agents are accountable for fulfilling their job responsibilities and commitments, and for maintaining their professional calendars. In so far as is practical, an Agent's calendar should detail daily work activities with regard to time and location and should be accessible to their colleagues and supervisor. If possible, a designated office support staff should always have a schedule of the activity and location of each professional in their immediate office.
2. Agents should keep office support staff apprised of their work schedule and should be reasonably responsive to phone calls, texts, and emails when working away from the office during regular office hours. Professional courtesy requires that Extension personnel communicate with their office/unit team in advance about their work schedule and when they will be taking vacation. The taking of sick leave should be communicated as timely as reasonably possible.
3. Professional scheduling should be designed at the mutual convenience of the organization and the individual. Professional scheduling is the responsibility of the Agent, to include advanced dialog with the immediate supervisor or the supervisor's designee. If the professional scheduling designated by an individual would negatively affect the unit's programs or function, the supervisor can deny that period of professional scheduling. If an employee still wants to take time off, vacation time must be used. Employees should adhere to normal procedures for requesting approved vacation time.
4. Professional scheduling does not negate the need to use vacation or sick leave consistent with university policy (and county policy, when applicable).
5. Typical use of professional scheduling involves a period of 4 hours or less. Agents may take up to 4 hours of professional scheduling on their own as long as they inform their supervisor or designee prior to taking the time off. Requests for periods of professional scheduling longer than 4 hours are permissible if based on extenuating circumstances (e.g., weekends of duty, periods of intensive work demand, weeks at camps, long conferences, extended travel, etc.) and approved by the individual's supervisor. The

appropriate amount of professional scheduling an Agent should take following predictable events such as camps and fairs may be addressed specifically.

6. Professional scheduling should be taken within a reasonable time period. The hours cannot be accumulated (i.e., “banked”) for future use.
7. A key consideration in professional scheduling is that the office or unit that the Agent functions within must, during all normal office hours, be able to sufficiently perform its programs and functions without undue burden on those left in the office due to the professional scheduling of one or more Agents in the office/unit.
8. Extension support staff within the office or unit should understand the concept of professional scheduling, be informed when Agents are using it to take time off, and develop an informed, professional, sensitive, and considerate response if asked where Agents are or what they are doing. The office should develop a plan that describes how to respond to walk-ins and phone calls intended for an Agent who is taking professional scheduling.
9. Different offices/units and individuals may have different programs and functions that make their respective ability to have flexible professional scheduling vary from the norm. Similar offices/units and individuals should have similar degrees of professional scheduling flexibility. Supervisors of similar offices/units and individuals should periodically share their practices with regard to professional scheduling oversight to assure that they are close to the norm of other similar offices/units.
10. At all times, Agents should carefully consider the public image impacts of their professional scheduling. For example, scheduling personal hours on Friday afternoon, Monday morning, or just before or after holidays should be carefully considered and justified.
11. If an Agent feels his/her management of professional scheduling is being questioned for inappropriate reasons, the Agent may contact the next level supervisor for consultation and guidance.

For County Extension Agents, there can sometimes be a conflict between the above professional scheduling philosophy and guidelines, rules, and/or regulations imposed by county government. In these cases, it is the responsibility of the CED and District Extension Director (DED) to clarify expectations with county government regarding the roles and responsibilities of Agents, the reason why professional scheduling is critical, and concerns regarding county and state policies relative to professional scheduling. The following excerpt from Florida State Statute 1004.37 is pertinent to this communication:

“Although county extension agents are jointly employed by the state universities and federal and county governments for the purposes of administration of the

cooperative extension service, *the personnel policies and procedures of the University of Florida or Florida Agricultural and Mechanical University*, depending on appointment, *will apply* except in those instances when federal legislation or the basic memorandum of understanding is applicable.”