Flexible Work Guideline - Supporting Document

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Contents

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1. Introduction

The University of Waterloo (UW) acknowledges the value of flexible work arrangements for both employees and the University. These advantages include improved employee wellbeing, employee retention, space utilization, productivity, sustainability, accessibility, and ability to manage commuting/parking pressures. Fundamentally, flexible work arrangements aim to provide UW with enhanced opportunities to modify when, where, or how people fulfill their roles while meeting the needs of the University.

Our priority is to meet the needs of students and research activities. In-person interaction is necessary for many forms of work and not all positions lend themselves to flexibility. Many positions require full-time presence on campus. Equity and fairness must be considered in relation to the content of each role and the opportunity for flexible work options.

2. Flexible Work Guidelines

When considering the viability of a flexible work arrangement, the following guidelines should be upheld.

- The University of Waterloo remains the employee's primary workplace and employees can be called back to the workplace for specific activities. Employees must reside within a reasonable commuting distance to respond to campus needs.
- Arrangements will be reviewed on an annual basis.
- Work must be performed in Ontario. Employment outside of Ontario has tax and benefits implications. Employment outside of Ontario is not considered a flexible work arrangement and must be addressed directly with Human Resources.
- Flexible arrangements must have a net zero or positive gain on the team or department to be considered.
- All Work from Home arrangements must be entered and approved through Workday.

3. Flexible Work Principles

As leaders consider requests for flexible work, the following principles should guide their decisions.

- **Aligned with department and institutional strategic plans, student experience, academic mission, and research and scholarship initiatives** – Decisions on flexible work arrangements will consider these components along with the requirements of the role and the need for collaboration.

- **Respect and reflect on the importance of diversity, equity, and inclusion –** We will ensure that the established assessment criteria is equitable when considering flexible work requests, understanding that each role is different and may have different requirements.

- **Encourage Sustainability -** Reduce institutional carbon footprint aligned with institutional sustainability goals

- **Maintain health and safety standards –** Health and safety requirements must be met and maintained regardless of the work location.

- **Optimize space utilization -** Enable better utilization of existing space including determining workspaces based on frequency of on-campus activities.

- **Consider financial implications –** Equipment and operational costs of flexible work arrangements. Every effort must be made to not duplicate infrastructure if employees are working in two places.

- **Protect university culture –** preserve our sense of community, belonging, and connection. Adapting our culture to new and innovative ways of working while prioritizing team dynamics (individuals working with others/ roles/work mentorship/shared working/ease of interactions), creativity, and collaboration.

This guide is designed to provide University of Waterloo leaders, supervisors and employees with practical information, resources and documentation when considering and/or managing flexible work arrangements.

4. Terms and Conditions of Employment

Employees that are interested in a flexible work arrangement should connect with their manager to discuss what flexibility may be available to them in their role. Flexible work arrangements are temporary in nature and are initiated by the employee. Flexible work arrangements do not change the terms and conditions of employment.

Employer-initiated requests for permanent work from home must have pre-approval and be decided based on ongoing and functional department requirements. Employer-initiated requests have impact on terms and conditions of employment that include financial obligations, tax implications and workplace safety liabilities.   Managers should contact Human Resources when considering employer-initiated work from home arrangements. Refer Appendix I for more details.

5. Flexible Work Arrangement – Considerations

A flexible work arrangement allows employees to perform their usual job duties at an approved alternative location within Ontario.

Supervisors need to consider and establish techniques for supervision and monitoring of workload and performance. They should determine and share the cadence and communication methods with their employees to ensure performance expectations are met, and communication channels are open. Employees working remotely are expected to maintain their regular hours of work unless alternate arrangements are made with their supervisor. Normal workloads are expected to be maintained for anyone with a flexible work arrangement.

Units that are providing flexible work options for employees should ensure that there is appropriate coordination across the department or faculty. Considerations should include minimum on-campus service levels, availability or workspace for employees working on campus, and any requirements for all staff to be present on campus for certain meetings or events. Consideration should also be given to onboarding, team development, cross training and on the job training as well as mentoring opportunities that benefit from in-person experiences.

Considerations

May be a strategic tool to retain valued employees who want to do flexible work for some of the time.	Changes to the essential way work is performed and requires a review of unit operations, job duties and responsibilities, and performance management practices before determining if such an arrangement is appropriate.
With a suitable remote work environment, employees can work with minimal distractions. Creating potential for improved productivity and efficiency.	Employees need to provide a suitable alternate space to perform their work, without decreasing productivity (minimize distractions).
Allows employees to organize their workday around their personal peak productivity periods, peak work demand periods, as well as accommodating personal needs.	Supervisors are to provide guidelines for practices on meeting with clients and ensuring appropriate University policies are adhered to.
Implementing flexible work across a unit may result in better space utilization.	Consider the issue of isolation of the employee, which may result in feeling less engaged with the work of the unit, department, or university.
	Consider the impact of missed opportunities of seeing/setting examples of others; engaging in work spontaneously on emergency items, dealing with unexpected work etc.

Example An employee may request to work from home Mondays and Tuesdays, while continuing to work in the office Wednesdays, Thursdays, and Fridays each week.

Consideration Before Initiating a Work from Home Arrangement

To maximize the potential for success, appropriate planning and consideration needs to be executed before initiating a work from home arrangement. Faculty/department leadership, supervisors and employees must all be involved in the development of the work from home arrangement to achieve a full understanding of a successful formalized arrangement.

Offering flexible work arrangements where it is aligned with the guidelines and principles would be UW's ideal. Flexible work arrangements will not be suitable for all faculties, departments, positions, and situations. All levels of staff should be open to discussions of the various factors and reasons of the decision and consideration process.

Consideration for Faculty/Departments

Assessing which types of flexible work arrangements will be available to employees ultimately is the decision of the Executive Council Unit Head. Consultation with Human Resources is available and provided. All faculties and departments should strive to provide opportunities for flexible work to employees in alignment with the guidelines and principles for flexible work. Considerations for faculties and departments include:

- Operational attributes of the unit or team. Including the requirements to access equipment, the nature of the work performed and the operating hours

- Budget impacts to implementing flexible work arrangements including scheduling and overtime impacts. Work from home arrangements should not result in additional work/overtime

- Student and client service impacts pertaining to service standards, staff levels and required operating hours

- The ability to provide equitable opportunities across the unit and with co-workers. This may not result in the same flexible work opportunities for all, however, decision making should be fair and consistent

- Critical or peak demand periods that may impact the ability to provide flexible work arrangements

- The expectation that flexibility schedules will change as deemed necessary for department requirements i.e. to meet in person needs of team and clients of the team (work; illness/absence; team meetings; trainings; professional development, etc.)

- Each unit/department with work from home arrangements must draft a service commitment statement that is publicly posted. This is intended to ensure in-person services are not compromised with work from home arrangements. Please see the Appendix II for additional details.

Considerations for Supervisors

Supervisors are responsible for confirming and administering the individual flexible work arrangements in accordance with the faculty/department guidelines, and relevant University policies. Working with the employees to see if a flexible work arrangement is feasible is important element to the success of the process. Considerations for supervisors include:

- Will the proposed flexible work arrangement raise any conflicts with the job requirements and duties?

- Employee performance considerations, including managing past work expectations and how performance will be monitored

- Employee's individual competencies to be effective in a flexible work arrangement, including autonomy, reliability, collaboration, and communication skills

- Technology and role considerations in a remote setting, including access to work-site technology, internet connections and software applications

- The collaboration requirements of the role with other staff members and the impact on other employees

- Flexible work arrangements will be assessed with a focus on established unit practices and tied to the guidelines and principles

- Impacts of a Flexible work arrangement on an employee's ability to achieve performance goals

Considerations for Employees

Employees applying for a flexible work arrangement should consider how the arrangement will impact their work life and consider factors which may impact their ability to achieve performance goals. While participating employees will remain covered by all terms and condition of their employment, they should consider potential impacts including but not limited to:

- Workload and personal responsibilities or interests and maintaining a healthy balance that supports their personal health and wellness

- Access to a dedicated workspace that has an appropriate infrastructure, internet access and allows for uninterrupted work

- Flexible work arrangements may impact the ability to differentiate boundaries. Employees require the ability to recognize and maintain boundaries between work and personal life.

- Increased expectation of different communication channels as reliance on email, teams, and alternatives to in-person communication

- Impact on on-campus workspace arrangements that meet the needs of all groups (i.e. team dynamics; supervisor and employee dynamics; employee and client dynamics; communications; spontaneous breakthroughs, etc.)

6. Administering Work from Home Arrangements in Workday

Confirming Flexible Work Arrangements

While all employees have the ability to request a flexible work arrangement, a supervisor's approval of these arrangements is based on operational requirements and the employee's specific role and responsibilities and is therefore not guaranteed. The supervisor shall determine if the arrangement is feasible, taking into consideration established policies and practices within the unit as well as any formal accommodation requests. Supervisors should conduct a review of the job, operational requirements, interdependencies, logistical details, and coordination of work within and outside the unit/department in order to determine whether the request is suitable for a flexible work arrangement. Any flexible work arrangement request is at the sole discretion of the Executive Council Unit Head.

Documenting Flexible Work Arrangements

Documenting flexible work arrangements provides a shared understanding of the terms of the arrangement and will be reviewed on a regular basis (annually) by both parties. Such arrangements can be terminated provided that each party gives the other appropriate notice. Please contact Human Resources to determine notice.
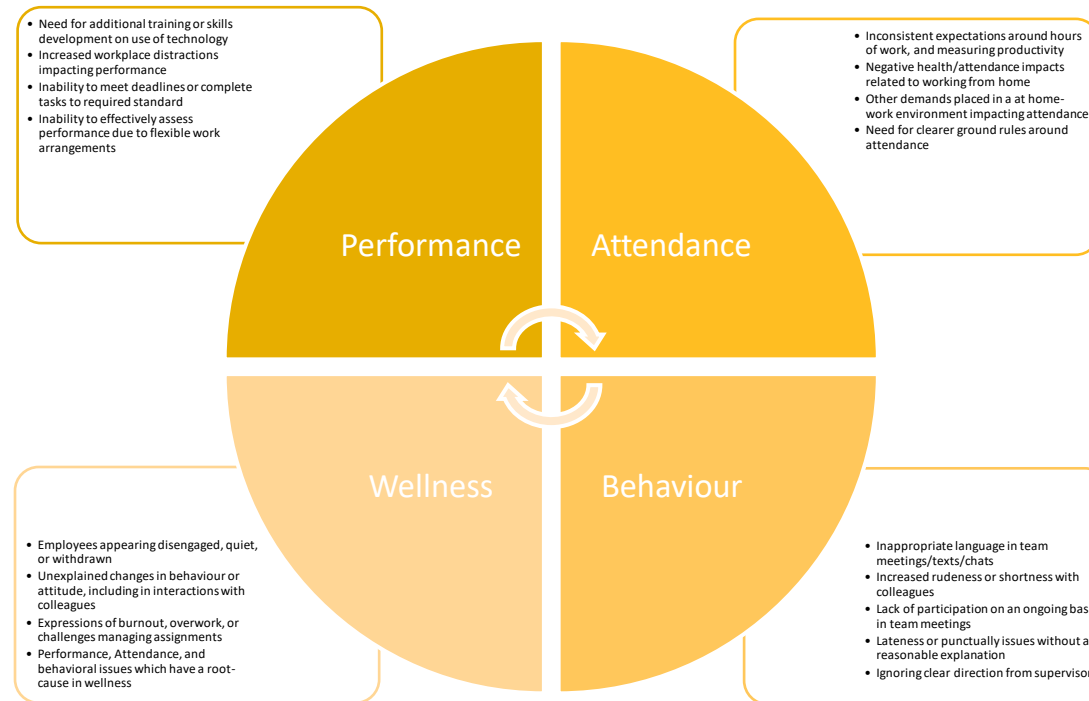
All flexible work arrangements will continue to be recorded in Workday with appropriate approval including the EC member.
This will enable data reporting on usage and frequency of flexible work arrangements and provide leadership with awareness of workforce activities. Please refer to the Work From Home Guideline for additional details.

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WATERLOO

Annual Stakeholder Review Process

Each December, departments exercising flexible work arrangements will be subject to a review process as part of their renewal. This review will be managed through the Workforce Planning Office. A stakeholder committee will be struck that should include representation from a cross section of campus including staff, faculty, and students. The review will seek information on the impact of flexible work arrangements on service levels, communication, and culture. This process will include a department stakeholder assessment and feedback process as well as a meeting with the stakeholder representatives.
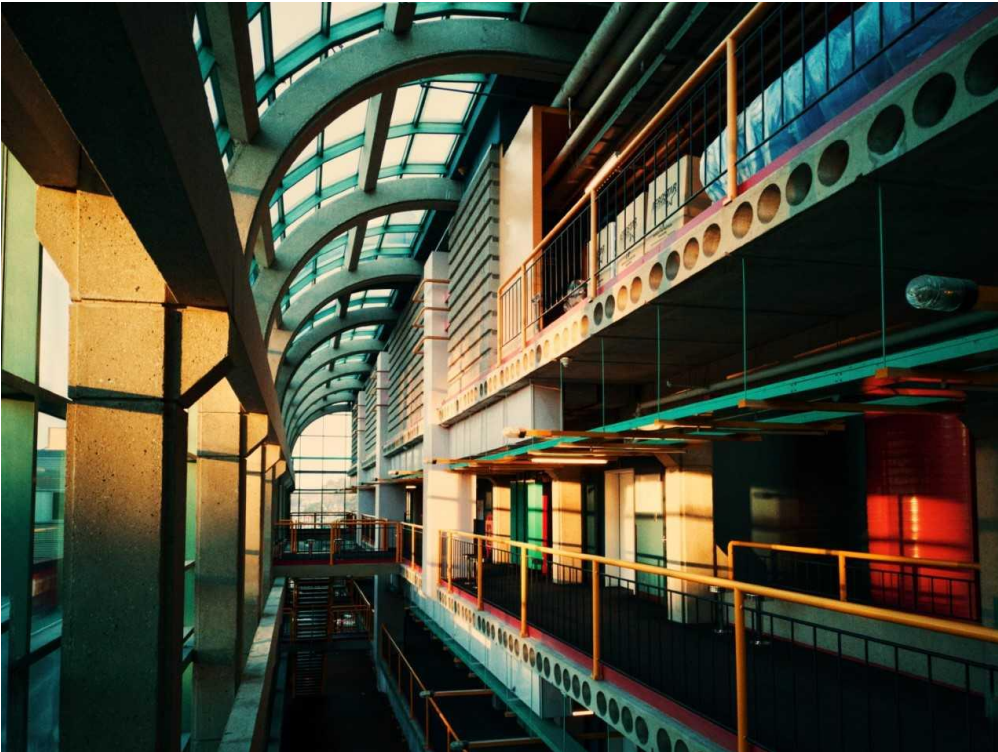
Monitoring Flexible Work Arrangements

Both the supervisor and the employee should expect ongoing adjustments to flexible work arrangements. An annual review and evaluation will allow issues to be identified and corrected by adjusting details of the arrangement. Several factors could trigger the need to modify the arrangement, including operational impact, work performance, and employee satisfaction, with some examples as follows:

- Need for additional training or skills development on use of technology
- Increased workplace distractions impacting performance
- Inability to meet deadlines or complete tasks to required standard
- Inability to effectively assess performance due to flexible work arrangements

- Inconsistent expectations around hours of work, and measuring productivity
- Negative health/attendance impacts related to working from home
- Other demands placed in a at home-work environment impacting attendance
- Need for clearer ground rules around attendance

Performance

Attendance

Wellness

Behaviour

- Employees appearing disengaged, quiet, or withdrawn
- Unexplained changes in behaviour or attitude, including in interactions with colleagues
- Expressions of burnout, overwork, or challenges managing assignments
- Performance, Attendance, and behavioral issues which have a root-cause in wellness

- Inappropriate language in team meetings/texts/chats
- Increased rudeness or shortness with colleagues
- Lack of participation on an ongoing basis in team meetings
- Lateness or punctually issues without a reasonable explanation
- Ignoring clear direction from supervisor

Where issues related to performance, behavior or attendance arise, supervisors should work with employees to address these concerns in a supportive and open manner. In some circumstances, this will include adjusting the method of communication and feedback to account for flexible work arrangements, including relying on communication methods other than in-person meetings. Regardless of how feedback is provided, supervisors should consider the following steps in addressing their concerns:

1. Set clear performance standards and communicate them effectively (aligned with our performance management process)

2. When performance concerns arise, address them in a timely, open, and supportive manner

3. Partner with employees to develop an action plan for addressing areas of develop, including identifying supports

4. If incidents continue, consider escalated forms of intervention, which may include adjustments to a flexible work arrangement

5. Consult with Human Resources for further options

Modifying or Concluding Arrangements

As part of the ongoing monitoring of flexible work arrangements, supervisors and employees should engage in regular discussions around the success of the arrangement. This can also be done as part of the annual performance appraisal conversation. In evaluating the arrangement, consideration should be given to the impacts, both positive and negative, on work performance, employee satisfaction, and department operations. If an arrangement needs to be modified, supervisors should communicate the rationale clearly, first in person and then in writing. In some situations, it may be necessary to discontinue the original plan or seek an alternative. The process used in revising or ending a flexible work arrangement should be just as carefully thought out as when initiating one.

Employees should have a role in determining any modifications to arrangements and should be given appropriate notice before an arrangement is modified or concluded. Additional notice may be required in situations where the adjustments could impact child-care or other personal circumstances.

Appendix I – Primary Work Location Chart

	Permanent WFH (pre-approved roles based on functional need)	Flexible Work Arrangement
Primary Work Location	Home office	Main campus
Terms and Conditions of Employment	Work location is home office per terms and conditions of employment	Terms and conditions of employment remain the same with a flexible work arrangement as an option
Review Period	Per business need	Annual review
Home Office Equipment	Computer (laptop) and standard peripherals provided; furniture not provided or reimbursed	
Expenses Eligible for Reimbursement (per Policy 31)	Reimbursed for travel to campus and other locations (when travel is required) Travel to campus for personal preference or personal reasons is not a reimbursable expense Home internet service – discussion outstanding (Finance and Human Resources are involved)	Reimbursed for travel to non-home and non-main-campus work locations (when travel is required)
Decision for Work Location	Employer required	Employee requested
Tax Implications	Home office expenses eligible for taxable claims (receive T2200)	No T2200 issued
Approval Process	Work from home detailed in offer of employment	Annual review

Appendix II – Service Commitment Example

OUR COMMITMENT TO SERVICE
Department XXXXX is committed to the UW experience by providing the best-in-class service. We will hold ourselves and each other accountable to our service values and service standards to be **available**, **compassionate**, **consistent**, **efficient**, **authentic,** and **inclusive**.

OUR SERVICE VALUES
Available

We will be available to address your inquiries in the preferable mode to your situation in a timely manner and will respond to all inquiries within 2 business days.

Compassion

We recognize that each service interaction is unique and will address you with empathy and kindness.

Consistency

We will make sure we address your inquiries equitably and accurately while ensuring that we apply policies and procedures consistently.

Efficiency

We commit to and will provide timely service in a way that provides clear and concise information.

Authenticity

We aim to provide service that is personalized, genuine and transparent. We will be held accountable to our service standards and commitment.

Inclusivity

We will use service standards that recognize your diverse needs and perspectives. We will provide fair access to service to allow you to successfully have your needs met. We will create a sense of belonging so that you feel respected.

Should you have comments or concerns with our service, please reach out the XXXXX@uwaterloo.ca.

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Appendix III - Equipment, Expenses and Tax Implications

Employees should be issued only one system (which includes computer, monitor, keyboard, mouse etc.) Home office set up will be the responsibility of the employee to participate in any flexible work arrangements.

Please refer to IST technology guidelines for system and remote needs. Specifically, IST recommends the following:

Work equipment guidelines
Department budget permitting, IST recommends University employees receive a laptop computer and one docking station. While a laptop is not a requirement, it is recommended to provide flexibility while working from home and in the office.

If you have a university-owned desktop
- Your desktop should remain in the office. To connect to your desktop from an off-campus computer, first connect to the campus virtual private network (VPN), then connect to your machine using Remote Desktop.

Please refer to Policy 31 regarding reimbursement of expenses. Home office expenses will not be covered through any Work from Home arrangements. Specifically, the Policy states that the following items are ineligible for reimbursement including but not limited to:

- Utilities of the employee's personal residence (including but not limited to phone, hydro, natural gas or internet)

- Office furniture (including desks and chairs); all University furniture purchases must be ordered through Procurement and Contract Services in consultation with the Safety Office who will address University requirements for such purchases

Employee initiated work from home arrangements and T2200 tax forms

- In accordance with our current University flexible work guideline, the University will not be issuing T2200 forms for the 2023 tax year
- The Canada Revenue Agency (CRA) issued additional guidance in February 2024 regarding issuance of T2200 forms for the 2023 tax year for employee initiated remote work arrangements
- After a full review of the CRA guidance, the University will not issue T2200 forms for our flexible work arrangements. The University continues to issue T2200s for the small number of employees who have full-time, permanent pre-approved work from home arrangements

UNIVERSITY OF
WATERLOO

Appendix IV - Work from Home - Health and Safety

While working remotely, you must comply with all health and safety standards and regulations. In addition, employees are responsible for ensuring their remote workspace and workstation setup is safe and ergonomically sound. Please review the Home Office Ergonomic Tip Sheet for information. Training, assessments and guidance is also available through the Safety Office.

You must immediately report any safety concerns that occur in the course of their employment to your manager. All work-related injuries incurred by an employee during work hours in the course and scope of employment, as well as all work-related illnesses, must be reported immediately to their manager.

The University will not be responsible for injuries incurred by others in the employee's remote work location.

Appendix V - Working in a hybrid environment best practices

Time management

When you are working from home, creating a schedule for your day will assist you in managing your time.

Tips for employees working from home:
Everyone organizes their work differently, but here a few things you might want to try:

- Write a "things to do today" list and keep it by your computer.
- Check things off as they are completed.
- Block off time in your work calendar for each task you need to complete today.
- Set alarms on your phone to work in blocks of time. Try things like 30-45 minutes of "Focus Time" mixed with five-minute breaks.
- Be on time for meetings - even if they are online. It is better to be the person who logs into the meeting a few minutes early rather than a few minutes late

Collaboration tools

The university offers several online collaboration tools. For a list of available applications, please visit the M365 website at:
https://uwaterloo.ca/microsoft-365/about/apps-you-have-access

Troubleshooting technical challenges

Technical support is available from IST Service Desks: **Weekdays 8:30 a.m. - 8:30 p.m. and Weekends 12:30 - 8:30 p.m.** To access support, please call 519-888-4567 ext. 44357. Alternatively, chat with the IST support team online at https://chat.socialintents.com/c/uwist.

Meetings

Meetings should be scheduled during regular working hours, (when possible). You must be available to attend these meetings when planned during your scheduled work hours and be virtual or in-person as required.

Communications around meeting format should remain flexible, looking to accommodate both in-person and virtual (when possible). In person meetings will be a requirement for all employees, regardless of their flexible work arrangement.

Individual work arrangements may be adjusted, and on-campus presence may be required to support workflow and/or cyclical needs of team function, student demand, projects, campus partner requirements, etc.

Managers may establish on-going or regular on-campus hours as needed, depending on time-sensitive projects, business process, or team needs.

Data Security

While working remotely, it is important that your home computing environment is secure. For details on how to achieve this, please consult the [Working from home securely](#) section of the COVID-19 website. Tips include:

Secure your home network

You should use a strong password for your home Wi-Fi network. Ensure that your home Internet router has all vendor software patches installed. If you rent your router, this may be done automatically by your Internet service provider. If you own your own router, you will need to verify this yourself. Refer to your router vendor's website for details.
Consider using free DNS-level protection for your entire home network, such as the CIRA Canadian Shield or OpenDNS.
See these videos from IST on how to:
Configure your home network router
Protect your home network with custom DNS
COVID-19: phishing, scams, and misinformation

Secure your computer

Use of a University of Waterloo computer is exclusively for work. Do not allow family members or others to use the UW computer you use for work.

Appendix VI - Your Wellbeing

Whether you work from home or are on campus, your daily routine will be impacted by public health restrictions and guidelines. For those seeking support, there are several health focused resources available. Options include:

- Contact your family doctor if possible

- Accessing the Employee and Family Assistance Program

- Signing-up for the Healthy Workplace Committee newsletter . Released each semester this newsletter covers resources and valuable tips to manage your wellbeing.

- Mental Health Toolkits (Mental Health at Work and Canadian Mental Health Association) can also help individuals transition back to in-person work.

Appendix VII - Active and sustainable commuting

Increased participation in flexible work arrangements may impact how and how often you travel to campus. The University of Waterloo is committed to providing programs, services, and resources to help you integrate active and sustainable travel into your weekly commuting. It's a great way to save money, improve local air quality, reduce greenhouse gas emissions, and contribute to a healthier lifestyle!

Use the tools below to help you with a low-impact commute:
GoTravelWise | Public transit | Cycling and walking | Carpooling | Emergency Ride Home | CarSharing | Electric vehicles