**NCCE EHRA MANAGED SCHEDULING**

Purpose- The charge of NC Cooperative Extension (NCCE) employees is to extend the educational mission of the land-grant universities in North Carolina to the people across the state. Often, the availability of these clients and/or nature of the programs dictate the need for Extension employees to work during non-routine office hours (i.e. lunch hours, evenings and/or weekends). Extension employees must be flexible to schedule these times to enable successful programming. It is also desirable that employees achieve a balance in work, home and community life.

Managed Scheduling is defined as the responsibility of controlling one’s schedule to best meet the needs of clients while achieving a balance between professional and personal time. Thus, this guideline has been established to allow employees who are classified as Exempt from the Human Resource Act (EHRA) the privilege of taking short periods of time for personal use during normal business hours. This helps employees achieve balance that is healthy for the organization and the individual.

All employee positions are classified as to their exempt or non-exempt status in accordance with the Fair Labor Standards Act (FLSA). The Exempt or Non-Exempt status of any particular employee must be determined on the basis of whether duties, responsibilities and salary meet the requirements for exemption.

Extension administration, specialists and agents are expected to meet their work objectives and, as professionals, are entrusted with the flexibility of balancing their work schedules. However, County Extension offices need to be sufficiently staffed to serve the public during established office hours per government expectations. As such, supervisors are responsible for coordinating schedules of all employees to ensure effective office coverage.

Due to the visible and public nature of Extension work, managed 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 managed 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.

**EHRA Employees** (Exempt from the State Human Resources Act)

Due to the nature of their responsibilities as educators, Extension Agents and County Extension Directors are exempt from the Fair Labor Standards Act (FLSA). Therefore they do not get paid overtime or compensatory time for weeks exceeding 40 working hours. The following principles apply to Managed Scheduling:

* Managed scheduling is not designed to compensate hour for hour for time worked over 40 hours in a work week;
  + When an Agent takes managed scheduling during normal work hours (Monday to Friday, 8 AM to 5 PM) the Agent is on his/her own personal non-work time.
  + When an Agent is working during what would normally be his/her own time (outside of the normal working hours) the Agent is at work.
* All requests for managed scheduling should be requested and approved in advance;
* Managed scheduling is a privilege that can be revoked if abused. This is to be reviewed on a per person basis and not across the board in a county; and
* Managed scheduling is not an issue tied to performance appraisal unless abuse results in unsatisfactory or poor program performance or improper personal conduct.

Implementation- The North Carolina Cooperative Extension (NCCE) expects employees to do what must be done to enable successful programming while practicing managed scheduling.

In order to ensure that managed scheduling is implemented equitably through the organization, the following points should serve as a guide:

1. Extension employees are accountable for fulfilling their job responsibilities and commitments and for maintaining their professional online calendars. Office support staff and County Directors should have access to the online calendars with details for each employee in the office.
2. Agents should keep support staff apprised of their work schedules 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 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 possible.
3. Managed scheduling should be taken at the mutual convenience of the organization and the individual. Managed scheduling is the responsibility of the employee with advanced agreement from their immediate supervisor or designee. If the managed scheduling request would negatively affect the unit’s program or function, the supervisor can deny that period for managed scheduling.
4. Managed scheduling normally refers to periods of four hours or less. Requests for longer periods of time are permissible if based on extenuating circumstances (e.g. multiple weekends, week(s) at 4-H camps, etc.) and if approved by the supervisor in advance.
5. Managed scheduling does not negate the need to use vacation or sick leave consistent with university policies.
6. All employees should understand the concept of managed scheduling, be informed when others are using it to take time off, and develop an informed, professional, sensitive and considerate response if asked where employees 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 employees who are using managed scheduling.
7. If an employee feels their requests for managed scheduling are continually being denied for inappropriate reasons, they are encouraged to contact the next level supervisor.

We recognize that there can sometimes be a conflict between the above managed scheduling program and rules/policies/regulations imposed by county government. In these cases, it is the responsibility of the County Extension Director and, when needed, District Extension Director to clarify the expectations with county government. It’s important to demonstrate why managed scheduling is critical to the success of our employees.