



# SOUTHWESTERN UNIVERSITY

## Hybrid and Flexible Work Policy

August 2023

### I. Introduction

Southwestern University (“Southwestern” or “the University”) is a residential liberal arts university where students live, work, and learn on campus. It is a teaching-learning community that encourages rigorous inquiry and scholarship, creative teaching, and the expression of free human life. The University relies upon the daily collaboration of faculty, staff, and students to successfully advance its mission and provide a high-touch experience.

In-person engagement remains a vital aspect of campus culture at Southwestern. We also recognize the important role hybrid and flexible work arrangements can play in advancing the work of the University, supporting a positive work-life balance for our employees by reducing commute times, and attracting and retaining great employees.

These arrangements are available to administrative and academic support staff and will vary by department, division, and position based on the operational needs of the University. Due to the nature of the work, many jobs can only be performed on campus but there may be opportunities for schedules to be shaped to benefit both the department and the employee. Any hybrid or flexible work arrangements will be consistent with departmental working hours and ensure appropriate coverage. Arrangements must be documented using the Hybrid and Flexible Schedule Work Agreement Form, which requires approval of the Vice President before implementation.

The employee working in a hybrid or flexible work arrangement must comply with all University and departmental policies and procedures. Hybrid or flexible work arrangements do not alter the compensation, benefits, work status, work responsibilities, and all other conditions of employment with Southwestern University.

Southwestern University will regularly evaluate the success and effectiveness of hybrid and flexible work arrangements based on individual performance and the needs of the University.

## **II. Definitions**

### *Flexible Work Arrangement*

A flexible work arrangement refers to a work schedule that differs from a traditional schedule (e.g., defined work hours between 7:00 am–4:00 pm instead of 8:00 am–5:00 pm)

### *Hybrid Work Arrangement*

A hybrid work arrangement refers to a work schedule where an employee is onsite for a defined number of days per week and works virtually for a defined number of days per week.

### *Remote Work Arrangement*

A remote work arrangement refers to a work schedule where an employee exclusively works virtually. This type of arrangement is not offered at this time except for rare exceptions that may be considered on a case-by-case basis.

## **III. Types of Work Arrangements**

### *Regular Hybrid Work Arrangement*

This arrangement is for employees in roles that can successfully be performed with a hybrid schedule and who have demonstrated the capability to perform their role successfully by splitting time between set days working on campus and set days working virtually throughout the year. Employees with regular hybrid arrangements may need to be on campus on a day that they might have typically worked virtually and should not expect that they will be able to substitute another virtual day.

### *Short-Term Hybrid Work Arrangement (Seasonal)*

This arrangement is for employees who must predominantly be on campus to perform their job but can, on occasion, successfully work virtually. Opportunities for this type of arrangement might include academic breaks or inclement weather days.

### *Flexible Work Arrangement*

Certain jobs that can be, or are, performed outside of regular business hours with limited supervision may be eligible for a flexible work arrangement. Flexible work arrangements will be evaluated based on the job duties and supervision requirements for work outside of regular business hours. Flexible work arrangements should not affect FLSA status.

#### **IV. Eligibility**

Senior leadership at the Vice President level, in consultation with Human Resources, will evaluate the suitability of existing administrative and academic support staff positions at the University for hybrid or flexible work arrangements and publish a list of eligible and ineligible positions. The nature of the role, “customer” expectations, operational needs, and position level will dictate eligibility. Eligibility does not guarantee approval of a hybrid or flexible work arrangement. Some levels of leadership will be required to remain fully onsite.

Positions that are primarily student-facing, public-facing, reception-based, or require routine in-person interaction to deliver essential campus services are not eligible for hybrid work arrangements. Such roles may be considered for flexible scheduling only, if operationally feasible.

A review of the individual’s suitability for a hybrid or flexible work arrangement must occur to assess the individual’s potential for on-the-job success. Hybrid and flexible work arrangements are both position and person specific. New employees should complete their first 90 days in their position on-site prior to taking advantage of hybrid work. A change in position within the University will require a new evaluation and assessment.

The CFO and President, upon recommendation by the Vice President, retain final authority to determine whether and when a position or employee may participate in a hybrid or flexible work arrangement based on institutional priorities and operational needs.

##### *Position Considerations*

A position’s suitability for hybrid or flexible work will be based on the operational needs and the responsibilities and duties of the role. The work arrangement should not impose a burden on students.

An eligible position is one in which most of the duties can be completed away from campus. There should be minimal burden on others in the office or department, from not having this position on campus. Positions that perform essential campus services will generally not be eligible for hybrid work but may be eligible for flexible work.

In all cases, institutional needs, student experience, and service expectations take precedence over employee preference.

##### *Employee Considerations*

An employee’s readiness for hybrid or flexible work should be considered as some employees may be better prepared to manage the requirements of these arrangements than others. When assessing readiness and performance, supervisors should focus on the quality and results of an employee’s work, not where it is being performed.

Strong performance in the following areas could indicate an employee's readiness for hybrid work:

- Solid understanding of their role and expectations
- Effective communication with internal and external parties
- Ability to prioritize work and meet deadlines
- Effective time management
- Ability to accomplish duties with minimal supervision
- Strong organizational skills
- Self-motivation
- Satisfactory Attendance record

#### *Disability Accommodations*

Hybrid and flexible work arrangements may not be used to replace sick leave, medical leave, family medical leaves of absence, or disability accommodations. Requests to work in a hybrid or flexible work arrangement as a reasonable accommodation are handled through the reasonable accommodation request process. Employees should discuss these requests with Human Resources.

## **V. Guiding Principles**

The following principles guide our hybrid and flexible work arrangement policy:

- a. Our future work model will focus on administrative and academic support work primarily handled by staff
- b. We must place serving students at the center of our plan in support of our mission to promote diversity of experience and ideas within our residential community
- c. Our plan must preserve a strong sense of community and collaboration for our students, faculty, and staff
- d. We must set expectations that hybrid and flexible work arrangements are fluid and evolving; progress and outcomes must be regularly assessed and adapted to emerging needs
- e. While hybrid and flexible work will be grounded in the nature of roles and operational needs, we are committed to equity, fairness, and consistency across roles in the implementation
- f. New employees should complete their first 90 days in their position before becoming eligible for hybrid or flexible work arrangements

## **VI. Work Requirements and Expectations for the Employee**

### *Work Standards*

Southwestern's policies governing the acceptable use of University's computer networks and systems, data security, privacy and confidentiality, workplace harassment, standards of conduct and disciplinary procedures remain in effect in all work arrangements.

Employees are expected to direct their full attention to work duties during normal working time.

### ***Internet and Workspace***

Employees electing to work in a hybrid environment are responsible for maintaining a minimum internet speed at their alternate work site to be verified by the University. The employee will acknowledge that they are responsible for the provision of internet service, phone, and appropriate furniture (e.g., suitable desk and chair) and home workspace to successfully complete their work. Southwestern will not be responsible for out-of-pocket costs associated with the employee's work location, including but not limited to furniture, home maintenance, cable, mobile phones, internet, utilities, any associated incidental costs (such as property or liability insurance), or other incidental expenses (e.g., cleaning services) unless otherwise required by law.

Employees will establish an appropriate work environment at their alternative work site for work purposes. Employees are expected to maintain their alternative workspace in a manner free from safety hazards.

Employees are expected to maintain an appropriate ergonomic environment, per OSHA standards. Southwestern will not be responsible for the ergonomics of an employee's alternative work environment outside the Southwestern's facilities.

### ***Work-Related Injuries***

If an employee working virtually incurs a work-related injury while working, they must notify their supervisor as soon as practicable and complete all necessary and/or management-requested documents regarding the injury, in alignment with University policy.

### ***Insurance***

The University is not liable for any injuries to family members, visitors, and others in the employee's home office. Employees seeking a hybrid work arrangement must carry homeowner's or tenant/renter's insurance that covers personal property and third-party injuries arising out of, or relating to, the use of the home as a remote/alternate work site and should consult their personal insurance carrier for advice.

### ***Schedule***

Employees seeking a hybrid or flexible work arrangement must discuss with their supervisors and identify a work schedule that meets departmental and University needs, including the provision of timely service and responses to customers and participating in departmental meetings and University functions. Unless approved in advance, employees who are working virtually will be available and reachable during the department's usual business hours and any other work schedule will be appropriately communicated to colleagues and customers.

Employees entering into a hybrid work arrangement are eligible to regularly work one day per week virtually. For employees in roles that require infrequent in-person interaction with colleagues, students, and/or customers, there may be an opportunity to regularly work two days per week virtually, if deemed appropriate. Supervisors should encourage alignment of days onsite among team members to foster meaningful collaboration while onsite, where appropriate.

Employees working in a hybrid or flexible work arrangement are required to comply with Southwestern's time keeping policies and must accurately record all working time. Nonexempt employees must obtain advance approval from their supervisor prior to working any overtime hours.

### ***Communication***

Employees seeking a hybrid or flexible work arrangement will discuss with their supervisors the expectation that they communicate at a level consistent with staff members working on campus or in a manner and frequency that is appropriate for the job and the individuals involved. Evaluation of performance in a hybrid work arrangement will include regular interaction by virtual meeting, phone, and/or email between the employee and their supervisor. Evaluation of performance in a hybrid or flexible work arrangement will be consistent with that received by staff members working on campus in both content and frequency.

### ***Dependent or Elder Care***

Hybrid and flexible work arrangements are not designed to be a replacement for dependent or elder care. The focus of the arrangement must remain on successful job performance and meeting departmental and University needs.

## **VII. Information Technology**

Employees seeking a hybrid work arrangement are required to adhere to any information security protocols required by University IT. To be eligible for hybrid work, employees must successfully complete the required cyber security training.

The University will provide a laptop to employees working in a hybrid arrangement. All other equipment (i.e., desks, chairs, monitors, printers, etc.) will not be provisioned by the University and will be the employee's responsibility.

Employees working in a hybrid arrangement are not permitted to relocate the alternate work site to any other location with public internet or environments that may pose security concerns.

Please refer to the Information Technology policy [here](#).

## **VIII. Working Out-of-State**

Employees in regular hybrid, seasonal hybrid, and remote work arrangements are only allowed to work virtually in the state of Texas at this time, except for limited situations in which approval has been obtained from the Vice President.

## **IX. Training**

Employees seeking to work in a hybrid work environment will be required to complete trainings related, but not limited, to basic job components, best practices, and effective time management.

## **X. Request and Approval**

Senior leadership, in consultation with Human Resources, will publish a list of positions that are eligible, ineligible, and conditionally eligible (e.g., eligible during specific times of year or in certain circumstances). Employees seeking regular hybrid, seasonal hybrid, flexible, or remote work arrangements must first discuss the proposed work arrangement with their supervisors. Employees then must seek authorization from the direct report to the Vice President and the Vice President.

Approval of any hybrid, flexible, or remote work arrangement is at the sole discretion of the applicable Vice President and may be denied, modified, or delayed based on operational needs. Approval decisions are final.

Employees seeking a regular hybrid, seasonal hybrid, flexible, or remote work arrangement will be expected to sign an agreement memorializing the arrangement.

## **XI. Work Arrangement Agreement Form**

All regular hybrid, seasonal hybrid, flexible, and remote work arrangements require a Work Arrangement Agreement Form (WAAF) to be in place. The agreement sets expectations and should be reviewed and updated as needed and, at least, annually. This agreement does not imply a contract or guarantee employment for a specific period of time. Completed agreements should be sent to the Human Resources Office.

## **XII. Termination of a Hybrid or Flexible Arrangement**

All approved hybrid and flexible work arrangements must be structured on a trial basis. Supervisors are responsible for assessing the effectiveness of the work arrangements through customer and staff/management feedback and performance monitoring, throughout the duration of the arrangement to determine if any adjustments are necessary or if the arrangement should be terminated.

The continued availability of hybrid and flexible work arrangements should be reviewed periodically by supervisors to determine if business needs are being met. If it is determined that the arrangement should be terminated, reasonable efforts may be made to provide two weeks of notice to accommodate commuting or other challenges that may arise from such a change unless terminating the arrangement is due to performance-related issues. The University or Vice President reserves the right to terminate any hybrid or flexible work arrangement at any time at its discretion.

### **XIII. Return of University Property**

Hybrid and remote employees separating from the University are required to return their University-issued equipment in accordance with the procedures outlined in the Employee Handbook.

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