

WORK-LIFE BALANCE

“The Balancing Act”

Workgroup Report FY 2016-2017



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Executive Summary

Heraclitus said it best: “The only thing that is constant is change.” In this new global and extremely competitive work environment, change is the norm. We work harder, longer and are tasked with doing more with less. Rising costs along with a “we can have it all” mentality has increased stress and pressure, created unrealistic expectations and, for many, this has led to a work-life imbalance.

While UC staff is impacted by increasing student enrollment, “right-sizing” of the UC workforce, and ongoing change initiatives, they also face challenges caused by the economy, family demands and other personal factors. In fall 2016, delegates from the Council of UC Staff Assemblies formed a staff emotional health and wellness workgroup — “The Balancing Act” — to review various components of existing emotional wellness/work-life programs. The committee focused their review in the following areas:

- Emotional health services/resources
- Home-life/personal care
- Job flexibility
- Financial well-being

Strengthening services and resources available to staff establishes a healthier workforce to support the mission of the UC system, reduces healthcare costs and employee absenteeism, and improves employee relations and morale. The link between health, stress and financial worries is profound. Per the 2015/2016 Global Benefits Attitudes Survey by Willis Towers Watson¹, 66 percent of the nearly 5,200 U.S. respondents who are struggling financially reported higher levels of stress and 20 percent who are struggling financially reported poorer health.

Absenteeism and productivity are greatly influenced by an employee's well-being. Results from this survey also indicated that when there are higher levels of workplace stress; 3.3 FTE days per year are lost to absenteeism. Conversely, of the respondents who reported as being healthy, 47 percent were highly engaged in the workplace.

This workgroup reviewed the current emotional health and wellness programs across the UC system and identified resources that are available to staff at different campuses. The group discovered is that resources for emotional health and home-life personal care vary greatly from location to location. All locations offer basic, free short-term counseling services but, beyond that, resources generally appear to be limited to online classes,

¹ Willis Towers Watson. “2015/2016 Global Benefit Attitudes Survey.” Accessed May 18, 2017.
<https://www.willistowerswatson.com/en/insights/2016/02/global-benefit-attitudes-survey-2015-16>



self-help books and a few workshops. All but one campus offers some kind of childcare assistance, however, the cost and availability are very restrictive. Resources for financial well-being (i.e., Fidelity) are present across all campuses but not utilized in great numbers. Other well-being resources such as discounts, workshops, commuting concerns, and support for food insecurity are widely disparate. Some form of job flexibility is offered at all campuses, but it's unclear as to how administration and managers support it.

Additionally, this workgroup has crafted recommendations for ways in which programs can be improved and expanded across the UC system.

Highlighted recommendations include

- Further expansion of the minimum standards document drafted by the UC Wellness Coordinators.
 - Dedicated FTE staff at the system-wide level to help create a culture of wellness and to oversee the system-wide program by ensuring that locations implement minimum standards and continually reassess wellness needs.
 - Leverage strong work-life/wellness programs through the UC system to provide guidance to the smaller and/or new wellness programs.
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Introduction

Per WhatIs.com, “Work-life balance is the optimal arrangement of an individual’s on-the-job and private time to facilitate health and personal satisfaction without negatively impacting productivity and professional success.” Typically, office culture and management styles dictate the balance between an employee's professional and personal life. Ideally, balance is achieved when there is an appropriate amount of workload coupled with sufficient time off. Additional benefits such as telecommuting, flextime, and financial well-being and wellness initiatives in the workplace contribute to a nurturing work environment.

Promoting work-life balance would be a win-win for both the employee and the UC. In his book, *The Golden Apple: Redefining Work-Life Balance for a Diverse Culture*² (2016), Mason Donovan cites a Corporate Executive Board (CEB) study in which 50,000 global employees were surveyed and those employees that felt they had a better work-life balance worked 21 percent harder than those who didn’t. Additional potential benefits include less absenteeism and burnout; as well as, higher employee engagement and positive promotion of their workplace as an ideal place to work.

The UC system was once seen as an employer of choice by Californians looking for a stable, long-term employer with good benefits, a promise of a pension, and a two-way commitment in support of the mission. In his article “10 Workplace Trends You’ll See In 2017”³, Dan Schawbel, Forbes contributor and research director at Future Workplace, indicated that the average tenure for employees is 4.6 years and for millennials it is only two years. Additionally, he stated that “Workplace wellness, and well-being, become critical employee benefits for attracting top talent” and that “the two most important employee benefits are healthcare coverage and work flexibility.” For the UC system, these changes in the workforce, can lead to

- a loss of long term institutional knowledge;
- failed or poor outcomes in recruitments due to candidate interest, qualifications, and rejected offers;
- a “revolving door effect” which has significant costs in direct turn-over; recruitment, training, etc.;
- lost engagement and morale amongst “loyal staff” working with short-term employees.

² Donovan, Mason. *Golden Apple: Redefining Work-Life Balance for a Diverse Culture*, New York: Taylor & Francis Group, Bibliomation, Inc., 2016.

³ Schwabel, Dan. “10 Workplace Trends You’ll See In 2017,” Accessed April 15, 2017.
www.https://forbes.com/sites/danschawbel/2016/11/01/workplace-trends-2017/#59b82bd356bd



Over a four-month period, this CUCSA workgroup surveyed subject matter experts across the UC system. Survey results show many best practices occurring at various campuses. Recommendations in this report reflect local best practices and programs that the Office of the President can leverage as tools for other locations.

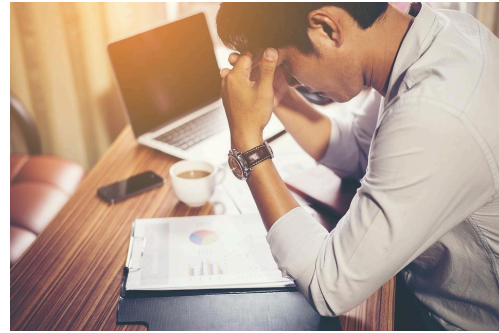
The following research and findings have been broken into the subsequent areas:

- Emotional Health
 - Home-life/Personal Care
 - Job Flexibility
 - Financial Well-being (in relation to emotional health)
 - Benchmark and Peer Institution Data
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Emotional Health

UC staff can be impacted by internal stressors (e.g., increasing workloads, change initiatives) and external stressors (e.g., financial and/or family demands). According to the American Psychological Association's 2015 Stress in America survey⁴, money, work, and family responsibilities are the top three sources of stress. Creating a psychologically healthy workplace benefits not only the employee, but the employer as well, by

- reducing absenteeism, presenteeism, and turnover;
- improving quality, productivity, and performance;
- lowering healthcare costs; and
- increasing ability to attract and retain high-quality employee's.⁵



For the UC, the level of resources available for counseling and other personal well-being programs that assist with these stressors vary widely between campuses.

Counseling Services

All UC campuses offer at least basic short-term counseling services to staff at no cost. However, the availability of on-site counseling, level of staffing, and services provided differ. San Francisco provides unlimited, free on-site counseling through its Faculty and Staff Assistance Program. On the other end of the spectrum, Santa Barbara's Academic & Staff Assistance Program is temporarily suspended due to a vacancy for its lone position. Berkeley, Davis, Los Angeles, Riverside, and the San Diego campuses all offer short-term, on-site counseling services. In addition, Berkeley, Davis, and San Francisco provide services to the Berkeley Lab, Division of Agriculture and Natural Resources, and Office of the President, respectively. On-site staffing ranges from 1 FTE at Santa Barbara to 12 FTE at Riverside. The programs at Davis, Los Angeles, and San Francisco provide training to interns and postdoctoral fellows to augment their counseling staff.

External service providers are being utilized at Irvine (ComPsych Guidance Resources), Merced (INSIGHT Employee Assistance Program), San Diego (San Diego Health), and Santa

⁴ American Psychological Association. 2015 Stress in America: Stress Snapshot." Accessed May 18, 2017. <http://www.apa.org/news/press/releases/stress/2015/snapshot.aspx>

⁵ APA Center for Organizational Excellence. "Benefits of a Psychologically Healthy Workplace." Accessed May 18, 2017. <http://www.apaexcellence.org/resources/creatingahealthyworkplace/benefits/>



Cruz (Optum). Ongoing, longer-term counseling is available to staff through their medical plans.

Other Emotional Health Programs

Many facets of wellness contribute to an employee's emotional health including financial wellness, physical wellness, nutrition, and work-life balance. Information regarding financial wellness and work-life balance programs are discussed later in this report and physical wellness is included in last year's report from CUCSA's staff wellness workgroup. Most UC locations offer supplemental emotional health resources in addition to those offered through the various UC medical and behavioral health plans and the system-wide UCNet website. These include resources that help staff deal with the stressors in their lives such as general stress management, resilience and happiness, and meditation and mindfulness. Human resources departments have primary responsibility for providing these services at most campuses. Other units having primary responsibility are University Health Services (Berkeley and Berkeley Lab), Campus Life Services (San Francisco), and Risk Services (Santa Cruz). Staff at UCLA can also access resources through their campus Healthy Campus Initiative website which includes the MindWell program to promote wellness of "mind, brain and spirit."

Systemwide and location-specific services and resources are available in a variety of formats including

- in-person classes, workshops, events and challenges;
- online classes available through the UC Learning Center;
- online challenges, webinars and videos from campus and external resources (e.g., Lynda.com);
- online reading materials (e.g., articles, fact sheets, e-Books); and
- self-help books available through campus counseling libraries or provided bibliographies.

The following table shows the types of resources currently available at each location which are often available via various units.

	Systemwide Offerings	Location-specific Offerings					
Location	UC Medical Plans, UCNet, and UC Learning Center	In-person Classes, Workshops, etc.	Lynda.com	Other Online Classes, Videos, etc.	Audio	Online Reading Materials	Self-Help Books
ANR	✓		✓			✓ (UCD)	
LBNL	✓	✓				✓	✓
UCB	✓	✓	✓	✓	✓	✓	✓
UCD & UCDCM	✓	✓ (meditation only)				✓	
UCI	✓	✓		✓	✓	✓	
UCLA	✓	✓	✓	✓	✓	✓	✓ (bibliography only)
UCM	✓						
UCOP	✓						
UCR	✓		✓		✓	✓	
UCSB	✓	✓ (mindfulness only)					
UCSC	✓	✓					
UCSD & UCSDH	✓						
UCSF	✓			✓			

Some locations such as Davis and Irvine also provide links to resources available at other UC campuses (e.g., Berkeley's Greater Good Science Center and the UC Wellbeing Channel on uctv.tv).

Home-life/Personal Care

In the state of California, talented employees in today's workforce have the expectation of incentives, influenced in part, by the vast resources provided in high tech/startup companies and the expectations of millennials entering the workforce. This means that the UC is challenged to be competitive in providing resources for employees and finding a balance between the requirements of the workload and the day-to-day operations of life. Making an effort to meet the needs of employees to attract and retain staff must be prioritized. This should not be treated as a lofty goal, but a necessity.

Work-life balance services provided by employers encompasses many things such as physical education and wellness programs, personal care services, healthy meal options, break activities, transportation alternatives, peer mentoring, standard/required training of supervisors/managers in supporting employees work-life balance, and home/life support services. This workgroup chose to concentrate research in three key areas: childcare, elder care, and programming/workshops in support of work-life balance.

Child Care

Ask working parents what money worries keep them up at night, and chances are they'll say childcare costs — and for good reason. According to the US Census Bureau⁶, overall childcare costs have nearly doubled in the last quarter century. Besides cost, child care challenges are often related to finding suitable and quality services in a timely manner. 9 out of 10 of the UC campuses are at an advantage in offering child care services to staff. However, this comes at a significantly steep price to working parents in terms of: cost, availability, location, and level of services and offerings.

The primary business of UC is education and, whether home or school based, most child care services offer an educational component. The opportunity to be “first in line” to educate the children of employees (who are also children of California) is of great importance as well as consequence. Early child care education lays the foundation for future educational success, beneficial to not only the child, but also the greater community both in social responsibility and core to the UC mission. This return on investment offers a solution and a benefit that generates a workforce of engaged and devoted employees, provides indirect financial benefits, such as reductions in turnover and absenteeism, and provides an environment for the production of higher quality and quantity work.

⁶ Laughlin, Lynda L. “Census Bureau Statistics Allow for Deeper Dive Into Rising Costs of Child Care”. Census Blogs. December 21, 2015.
<https://www.census.gov/newsroom/blogs/research-matters/2015/12/census-bureau-statistics-allow-for-deeper-dive-into-rising-costs-of-child-care.html>

The table below shows types of child resources currently available at each location. As identified above, cost and availability seem to be significant obstacles in UC employees accessing these services and supporting their family planning.

Location	Centers (On Main Campus)				Costs (Monthly)		
	Number	Age Range	Provider	Waitlist	Infant	Toddler	Preschool
UCB	5	3 months to K	Vendor, UC employees	Yes	\$2200	\$2000	\$1675
UCD	3	3 months to 5 years	2 Vendors	Yes	\$1485	\$1280	\$1170
ANR	See UCD						
UCDMC	See UCD						
UCI	5	3 months to 12 years	Vendor and Campus	Yes	\$1625-1675	\$1275-1475	\$850-\$1275
UCLA			Vendor and Campus	Yes	\$2200	\$1930	\$1500
UCM	1	6 weeks to 5 years	Unknown	Yes	\$1024	\$893	\$683
UCOP	None	N/A	N/A	N/A	N/A	N/A	N/A
UCR	2	2 months to K	Campus	Yes	\$1570	\$1475	\$460-\$1000 *
UCSB	2	3 months to 5 years	Vendor, UC employees	Yes	\$730-\$1520 *	\$555-\$1130 *	\$555-\$1130*
UCSC	None	N/A	N/A	N/A	N/A	N/A	N/A
UCSD & UCSDH	2	3 months to 6 years	Vendor	Yes	\$1725	\$1449-\$1660	\$1317
UCSF	4	3 months to 5 years	Vendor	Yes	\$1119-\$2381 *	\$1010-\$2057 *	\$940-\$1843 *
LBNL	None	N/A	N/A	N/A	N/A	N/A	N/A

*dependent on number of days of week, 1-5 days

The level of services offered in this area across the system varies significantly and presents different levels of service with no UC standards. For example, Santa Cruz is the only “campus” that does not offer any child care service or alternative options to employees (staff and faculty), nor does it have a firm commitment to offer any in the near future. When some campuses/locations offer such a service and others do not, it can be perceived as insincere and uncaring. Locations that do not have such service are deemed not important enough to be allocated resources and campuses that have services may view such resources as volatile with no permanency.

Elder Care



The California Department of Aging publishes a “State Plan on Aging”⁷ every four years. In the 2013-2017 plan, the executive summary states “Since 2000, California’s population of persons 60 and older has grown rapidly. Between 1950 and 2000, the number of older adults in this State grew from 1.6 million to 4.7 million, an increase of 194 percent. This trend will continue as the number of people age 60 and over grows to 13.9 million by 2050, an increase of 128 percent from 2010. By 2050, it is estimated that over 25 percent of Californians will be 60 or older.” This is significant in that each UC location plays an important part in age related research, providing health services, and supporting the aging population of California. Yet, as an employer, the UC system provides minimal resources for employees supporting those advancing in their age.

Although the family care resources provided by the UC system, such as the services of Bright Horizons Care Advantage™: Years Ahead and the Employee Assistance Program (EAP), can assist with elder support in the form of counseling, offering resources, and directing an employee to support groups, these services are not well marketed and seem to get lost in the sea of UC web resources.

The bulk of UC locations do not advertise the UC systemwide elder care support benefits to employees, nor offer any additional resources. Berkeley, Davis, and Riverside are three locations that provide additional employee directed programs. Different in scope and breadth, each brings elder care to the forefront of work-life balance and wellness. Davis extends their programming to both adult and elder care, citing that “Two out of every five adults are family caregivers”⁸. Davis also integrates local campus research and expertise, community resources, recreational programming, local support groups, campus centers, and lifelong learning into their programming. Included in the Be Well at Work programming, Berkeley offers free, confidential counseling, consultation, assessment and referral to local and long-distance resources to all employees. Taking a more general route, Riverside provides a focus on how to begin providing elder care, acknowledging legal rights, home health, finding resources and services, and death and dying.

The wealth of knowledge and research within the UC system on aging is noteworthy, yet it seems that there is untapped data and expertise in assisting and guiding UC employees through the “age wave” in a centralized and standardized manner.

Work-life Programs and Workshops

⁷ California Department of Aging website. Accessed May 29, 2017.
https://www.aging.ca.gov/docs/About_CDA/California_State_Plan.pdf

⁸ Fox, Susannah, Duggan Maeve, Purcell, Kristen. “Family Caregivers are Wired for Health.” Pew Research Center. June 20, 2013.
<http://www.pewinternet.org/2013/06/20/family-caregivers-are-wired-for-health/>



The average workforce has the capability to be tuned into work 24-hours a day as technology keeps them perpetually connected. Some are able to manage this by disconnecting when their personal life needs to come first. For others, putting down the phone or laptop can be a difficult decision when the workload continues to mount, fears of job loss are never ending, and a younger generation of employees are considered to be tough competition.

The majority of the UC locations offer some package of work-life balancing programming. However, few locations have units, staffing, and static programs dedicated to supporting a healthy workforce. Some of these services are offered in a disparate manner via units such as Staff Human Resources, Benefits, Diversity and Inclusion, women's resource centers, counseling centers, etc. The UCnet web site⁹ offers a list of "Work-Life" Coordinators for each location (except the Division of Agriculture and Natural Resources), however this list is out-of-date, including several contacts no longer employed in the UC system.

One of the most robust programs in the UC system is "Be Well at Work" at UC Berkeley. Covered areas include disability management, employee assistance, elder care, ergonomics, occupational health, wellness, and work-life. Drill down into each of these topics and you'll find detailed information about workshops/trainings/activities/programs, resources for managers/supervisors, newsletters/handouts/forms/guidelines/policies, on-site and off-site resources, and much more. The program exemplifies a location taking a complete view of the overall needs of employees "to support wellness at work" and "improve employee health and well-being, leading to a more engaged and productive workforce".¹⁰

A greater number of locations offer limited workshops in the areas of lunch and learns, emotional intelligence, conflict management, time and stress management, and change management. These opportunities can be viewed more aligned to work-office balance than work-life balance. In limited instances, there are also workshops for new/expecting parents, preparing your child for college, parenting skills, and personal finance.

Employees will continue to face difficulty "unplugging" from work as technology increases into every facet of daily life. How to integrate better personal well-being programs into the workplace will be key in finding time and space to provide a healthy balance for employees.

⁹ UCnet Work-Life Coordinators web site. Accessed May 29, 2017.
<http://ucnet.universityofcalifornia.edu/contacts/work-life-coordinators.html>

¹⁰ UC Berkeley Be Well at Work website. Accessed May 29, 2017.
<https://uhs.berkeley.edu/bewellatwork>

Job Flexibility

Many studies have been conducted around how to attract the best employees, and once they are hired, how to keep them happy, engaged, and productive. Among the top five ways to attract, retain, and engage talent is by providing them with job flexibility¹¹.

With flexible work times, employees are able to balance their work with their personal and family needs. Staff who are offered telecommuting as an option can choose their own work environment, minimizing distractions and interruptions.

Most of the UC locations are in populated cities with high costs of living, forcing employees to choose between higher housing costs or longer commutes. Flexible work arrangements give employees the ability to live further away from their work site, where housing is more affordable. It also allows employees to vary their work schedules so that they can drive when traffic is less heavy, thereby spending less time commuting. This can help reduce employees' cost for transportation by saving on gas. In addition, the time saved from commuting will give employees more time to sleep and lower stress, which leads to improved productivity, happiness, and well-being.

Employers who allow flexible work arrangements will increase employee "commitment and productivity, resulting from support for personal work style preferences," as well as reduce "absences and tardiness."¹² In an environment where staff are being asked to do more with less, increased productivity is crucial to achieving success. With higher levels of employee engagement and satisfaction, there will also be a reduction in turnover. Employers can retain talent and reduce costs and time lost on recruitment and onboarding.

Job flexibility is also one of the major factors in becoming an employer of choice. "A recent survey conducted by *The Washington Post* found that 88 percent of workers in the region say that workplace flexibility is important to them, a figure which equals the percentage identifying health care benefits as important to their job. Flexibility was more valuable to employed respondents than having a chance for a promotion or being recognized for professional accomplishments."¹³ With a competitive job market and limited wage

¹¹ Alton, Larry. "7 Ways to Attract Employees in the Current Business Climate." Forbes.com. October 28, 2016. <https://www.forbes.com/sites/larryalton/2016/10/28/7-ways-to-attract-employees-in-the-current-business-arena/#61027d6250cc>

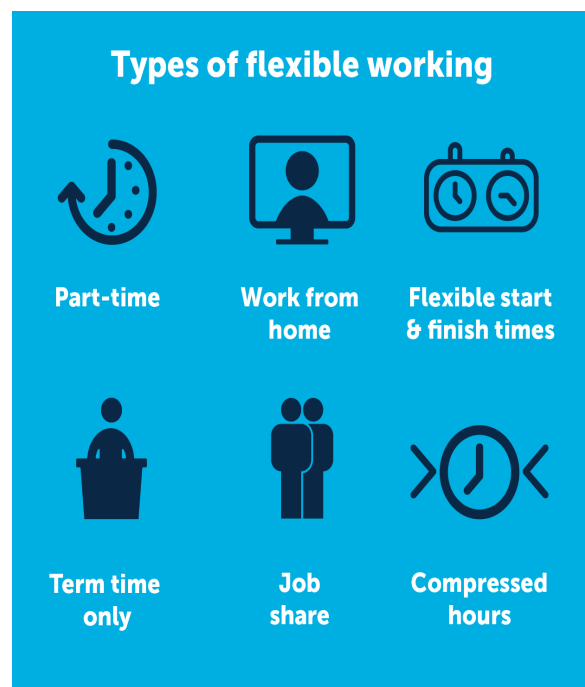
¹² Walsh, Mairead. "How to use Flexible Working Arrangements to Benefit your Business". Softworks Blog. March 10, 2015. <http://blog.softworks.com/bid/104928/How-to-use-Flexible-Working-Arrangements-to-Benefit-your-Business>

¹³ Fell, Sara Sutton. "5 Ways Telecommuting and Flex Time Help You Recruit the Best Workers." Entrepreneur.com. October 1, 2014. <https://www.entrepreneur.com/article/237960>

increases, having a job flexibility program is seen as an added benefit, allowing employers to attract better talent. Having flexible work arrangements also broadens the talent pool since employers are not limited by geographical restrictions.

Employers experience cost and space savings when employees are not required to be physically in the office every day of the week. It is estimated that companies who let their staff telecommute could save approximately \$11,000 annually per employee per year.¹⁴ Real estate is expensive and space is a commodity for many of the UC campuses. If more employees participate in flexible work programs, employers will not need as much space to accommodate them, such as offices or parking lots. Campuses can utilize more shared office spaces and the additional space could be reallocated for additional classrooms or residence halls to accommodate increased student enrollment. Employers would achieve cost savings by reducing the demand for overhead and infrastructure, such as furniture, janitorial services, transportation subsidy programs, and other needs. An additional environmental benefit of flexible work programs is sustainability. Flexible work arrangements such as telecommuting help “conserve energy, avoid greenhouse gas emissions, and reduce traffic congestion.”¹⁵

Current UC Landscape



Currently, all of the UC locations allow and have guidelines for flexible work arrangements. There are many options available to staff.

Compressed Hours/Workweek

Compressed workweeks are alternative work arrangements where a standard workweek is reduced to fewer than five days, and employees make up the full number of hours per-week by working longer hours. This can be in any variation as agreed upon by the department head or supervisor, but the most common types of compressed workweek schedules are:

telecommuting?" PGI.com. March 20, 2013.

<https://www.pgi.com/blog/2013/03/what-are-the-cost-savings-of-telecommuting/>

¹⁵ Walsh, Daniel. "How Telecommuting Lets Workers Mobilize for Sustainability." Greenbiz.com. February 17, 2011.

<https://www.greenbiz.com/blog/2011/02/17/how-telecommuting-lets-workers-mobilize-sustainability>

- 4/10 schedule (4 10-hour days per week)
- 9/80 schedule (80 hours in a 2 week period worked over 9 days instead of 10)

Telecommuting/Work from home

Telecommuting is an arrangement in which an employee regularly performs work at a remote worksite (such as in their home) for a specified portion of the workweek.

Flexible hours/Alternative Work Hours

Employees may be granted approval by their department head to work a certain number of hours each day, but the hours of work may vary from the "traditional" schedule. Such arrangements typically include a fixed core period each day.

ERIT (Employee-Initiated Reduction in Time)

The Employee-initiated Reduction in Time (ERIT) Program provides an opportunity for employees to voluntarily reduce their current appointment percentage and corresponding pay so that the university can achieve temporary salary savings.

Phased Retirement

The University Phased Retirement Program allows eligible policy covered staff the opportunity to transition into retirement by reducing their appointment percentages over a period from 120 days to up to three years.

Part-Time Work/Job Sharing

Part-time work is useful when an employee has skills that are not needed on a full-time basis, or when the employee has the means and desire to spend significant time on family responsibilities or outside interests. Part-time work can also be part of a job sharing arrangement, in which two people share the responsibilities and duties of a full-time position.

At all of the locations, individual unit heads or supervisors determine approval and implementation of flexible work arrangements. All campuses provide a template or have a standard form that is used to establish flexible work agreements.

Since represented employees are bound by the rules of their respective collective bargaining agreements, they may participate in flexible work arrangements as their contracts allow. However, for non-represented or eligible policy-covered employees, there are varying requirements of eligibility for participation across campuses. Most locations state that employees should have passed probation and have met a minimum requirement on their performance evaluations in order to be eligible for flexible work arrangements. Santa Barbara and Santa Cruz explicitly state that certain arrangements are only available



for career employees, while other campuses do not specify. There is also variance between eligibility for employees with exempt and non-exempt status. Some locations state that it is challenging for non-exempt employees to telecommute due to time-keeping requirements, and typically reserve participation for exempt employees only.

Levels of resources provided to unit heads and supervisors to assist them in making the decision to approve and implement flexible work arrangements differ at each campus as well. Some campuses have clear and robust guidelines, processes, templates, checklists, and other materials available, such as

- guidelines for employees when developing a proposal for flexible work arrangements;
- considerations for approving flexible work arrangements for supervisors, managers, and department heads;
- “Do’s & Don’ts” when implementing flexible work arrangements;
- communications agreements between supervisors and employees participating in flexible work arrangements; and
- checklists for safety, liability, intellectual property, electronic privacy, and other concerns associated with employees working at a remote site.

Job Flexibility Analysis

Although guidelines for flexible work arrangements are available at each location, it is unclear how administration and managers support these programs. Because agreements are established at the unit level, there is no central tracking of the number of agreements that exist at the locations, and no ability to report on the impact or effectiveness of flexible work arrangements.

Lack of support for flexible work arrangements could be due to many factors, including but not limited to: lack of education for departments and supervisors around the benefits of flexible work arrangements, lack of knowledge around the eligibility and process for implementing flexible work arrangements, lack of training for managing perceived inequity among staff, or lack of trust in the ability of employees to work off-site or outside of traditional hours.¹⁶

The following experience of transitioning to flextime provided by a staff member at the Division of Agriculture and Natural Resources shows some of the difficulties that many staff face at all of the locations, how some of those issues can be resolved, and the importance of job flexibility and the benefits that it provides.

¹⁶ “Advantages of Agile Work Strategies For Companies.” Globalworkplaceanalytics.com. Accessed May 18, 2017. <http://globalworkplaceanalytics.com/resources/costs-benefits>



“The administrative staff at UC ANR’s San Diego location transitioned to flextime in April 2016. The road to get there was paved with twists and turns, however, from the staff’s viewpoint, it was the best decision that could have been made. Until February of 2016, our office did not even know modified work hours – aka flextime – were an option for ANR. An administrative person stumbled upon modified work hours information on the UC Office of the President’s website when looking for something else. When the question of flextime was asked of ANR’s HR department, we were told that indeed it was an option for both exempt and non-exempt staff but was at the discretion of their supervisor.

As I was the supervisor for the administrative staff and was extremely excited about the opportunity, I jumped on the idea. I called a meeting of all administrative staff to seek their input as to what they would like to do. Of the five administrative staff, two wanted to maintain traditional hours (M-F, 8-5) and three of us wanted to try the flextime. Two of those staff are represented and were not allowed to work more than 40 hours per week (or overtime had to be paid) so the 9/80 option was not going to work. Therefore, the three of us opted for 4/10’s.

Two staff chose to take Monday’s off and I chose Fridays. We tried this schedule for three months to gauge any impact on the office. The office continued to run smoothly, with no complaints from the other staff or academics. We have maintained this schedule in the year since we transitioned to the 4/10’s and we all love it. We now have days we can make doctor or dentist appointments, take our vehicles in for maintenance/repairs, schedule household repairs, attend parent/teacher conferences and even take little mini vacations. Additionally, we have noticed reduced stress as we have one less day to deal with the hour (or more) commute to the office, have less wear and tear on our vehicles and contribute less to the pollution issue.

I think best of all, is the fact that staff are much happier in that they feel they have a choice in their work life balance. Those that chose to remain on the traditional work schedule are happy and those that chose the flextime are happy. Speaking for myself, I feel I am much more productive as well as I enjoy coming to work more than in the past. The 1½ hours I have from 5-6:30 pm are completely uninterrupted and so much gets accomplished.

For reasons unknown, the San Diego office is the only ANR office that has staff on flextime. Is it a little more work in the beginning to coordinate staff so the office continues to operate smoothly? Absolutely, but the long-term benefits for everyone far outweigh any small inconvenience up front.



As an exempt employee since I was hired in 2003, I have worked so many more hours than my 40 hours each week – as most exempt staff tend to do. I always felt I needed to complete every bit of my work before going home. Even with all the ‘extra’ hours I have worked, in my 14 years with the University, I have *never* gone home with all my work completed. I finally realized it was never going to happen and I needed work-life balance. The flextime schedule has given me just that.”

Financial Well-being

In order to achieve financial well-being, an individual must look at their current financial position, review their short- and long-term needs and then execute a plan to achieve those needs within their own individual limits. It is understanding your financial situation and taking care of it in a way that allows you to make changes when needed. Individuals need to be comfortable with where their money comes from and where it is going.

The UC system offers an array of financial benefits through Fidelity Investments (Fidelity) to help staff achieve financial well-being. Fidelity will answer questions regarding enrolling in the program, account information, changing contributions, distributions and performance information. Additionally, Fidelity offers a plethora of workshops at each UC campus and location and will provide free one-on-one consultations if requested. Their website contains a wealth of information, tools and resources. All UC staff have access to this free resource.

While all UC campuses and locations offer Fidelity as their primary source of financial planning, all but three campuses — Riverside, San Francisco, and Santa Cruz — offer additional financial well-being services other than Fidelity, such as workshops given by various credit unions. Berkeley offers an annual “Financial Fair for Personal Finance” event where faculty, staff and retirees can attend workshops, learn about campus resources and visit with campus financial vendors.

Discounts on items such as phones, lodging, transportation, entertainment, and fitness centers are offered at a system-wide level. There is very little support for childcare or housing needs: Irvine and San Francisco have minimal support for housing and only San Francisco has negligible onsite childcare available.

Furthermore, only three campuses — Los Angeles, Davis and Merced — offer support for staff living with food insecurity. The October 2016 food insecurity study of University of California employees conducted by the Urban and Environmental Policy Institute at Occidental College¹⁷, found that more than two thirds (70%) of UC’s clerical, administrative and support workers who responded to the survey struggle to put adequate food on the table. Therefore, according to this statistical sample and as defined by the US Department of Agriculture, many UC clerical, administrative and support staff are considered food insecure. Unfortunately, this statistic is over five times higher than that of all California residents, 12.6 percent of whom were food insecure. If, per Maslow’s hierarchy of needs,

¹⁷ Drier, Peter, Bomba, Meghan, and Romero, Rosa. “Food Insecurity Among University of California Employees”. Urban & Environmental Policy Institute Occidental College. October 2016.
<https://www.documentcloud.org/documents/3146330-Occidental-UC-Employees-FINAL.html>



staff's basic physiological survival needs (food, clothing and shelter) are not being met, the human body cannot function properly and work-life balance will be out of kilter.

Additional Findings

A number of other areas that are wanting when it comes to staff well-being. None of the locations are utilizing Risk Services to assess staff well-being: only items that protect academic members and staff from unanticipated loss such as ergonomic issues, accidents (vehicle and employee) and items such as facility use agreements are analyzed. Six locations— Riverside, Berkeley, San Francisco, Santa Barbara, Davis and Merced — offer some kind of supervisor training on staff well-being, with Berkeley offering the most comprehensive. Their in-person training on Keys to Enhance Your Supervisory Success (KEYS) covers several vital areas in staff well-being. The other locations offer online trainings, workshops and are given various resources. Additionally, aside from accountability in annual performance evaluations, no campus or office holds supervisors accountable for promoting work-life balance. Also, only three locations— Berkeley Lab, San Francisco, and Riverside — currently collect data on commute miles or travel time for staff.

Involvement of local staff assemblies in staff well-being and work-life balance programs runs the gamut of very involved to not involved at all. Staff assemblies for seven locations— Division of Agriculture and Natural Resources, Irvine, San Francisco, Berkeley Lab (no formal Staff Assembly), Santa Barbara, Santa Cruz and Los Angeles — have minimal to no involvement and staff assemblies for five locations— Riverside, Berkeley, Davis, San Diego and Merced — are very involved. All the locations with active Staff Assembly involvement indicated communication and collaboration are vital to their success. The formulation of specific wellness committees assisted in their involvement, too.

Benchmark and Peer Institution Programs

The Office of the President, specifically the Institutional Research and Planning organization (IRAP), use the following standardized lists of universities for comparison purposes.

Private comparison institutions

- Harvard
- MIT
- Stanford
- Yale

Public comparison institutions

- University of Illinois
- University of Michigan
- University of Buffalo
- University of Virginia

University of Michigan's MHealthy Program¹⁸ was established in 2005 to encourage a culture of health at the University of Michigan. This comprehensive program had gained national recognition by earning the World at Work 2016 Seal of Distinction award. Housed under Human Resources, MHealthy is led by the director of University Health Services. MHealthy is supported by a number of staff specializing in health behavior change, including fitness, nutrition, tobacco cessation, alcohol management, and health behavior and health education. Notable programs include

- **Understanding Mental and Emotional Health:** Program designed to offer faculty, staff and dependents high-quality accessible mental and emotional health resources and foster a healthy workplace culture. Highlights of this program include lunch and learn events, counseling services, and training courses.
- **Thrive:** A comprehensive stress management and prevention program that aims to foster psychological well-being by energizing work climates, enhancing relationships, and maximizing personal strengths.
- **MHealthy Rewards:** An incentive based rewards program designed to help motivate faculty and staff well-being.

¹⁸ University of Michigan MHealthy website. Accessed May 18, 2017.
<https://hr.umich.edu/benefits-wellness/health/mhealthy>



The University of Buffalo¹⁹ is another great example of a well-established well-being program. Buffalo has designed their program with a focus on stress management, mental health, life-changing events, personal relationships, child or elder care, etc. Similar to the University of Michigan, Buffalo's mental health and work-life wellness program is housed in Human Resources with a close tie to Workers' Compensation and Safety Services. Notable programs include

- Train: Wellbeing: Free workshops are offered to all employees on each of their campuses during the fall and spring semesters, and during the summer. Workshops are led by professional experts on the topic and participants are typically highly satisfied with the workshops they attend. Employees may attend workshops during their work time, provided that they have received supervisory approval.
- Professional Well-being Improvement Program: Free, voluntary and confidential assistant on *any concern* that is impacting an employee's work. An employee assistance consultant will help create an action plan, suggested training, and make referrals based on personal needs.

¹⁹ University of Buffalo Administrative Services Gateway website. Accessed May 18, 2017.
<http://www.buffalo.edu/administrative-services/for-faculty-staff.html>

Recommendations and Conclusion

This workgroup was impressed by the number of support programs and initiatives found throughout the campuses. The biggest challenges seem to be

- Lack of a system wide repository for wellness programs and initiatives. Currently, the UC Living Well webpage (<http://ucnet.universityofcalifornia.edu/working-at-uc/livingwell/>) only provides links to campus' primary wellness website. Efficiency can be found by hosting a database of programs offered across the system. This would create a valuable resource to wellness coordinators across the system when developing programs.
- Sporadic use of the system-wide Wellness Program Minimum Standards Framework (Appendix A)
- Creating a culture of wellness by removing the stigma of taking time for health. This includes support at the local and system-wide level.

Members of CUCSA and the chair of this workgroup were invited to attend the 2017 Wellness Summit Framework meeting in March 2017. This summit brought together members of Office of the President, CUCSA, campus wellness coordinators, and health care providers from across the system. This workgroup feels that the 2017 Wellness Summit was a great first step for Office of the President and shows real promise for creating a culture of wellness system-wide. Many of the recommendations below can also be seen in the 2017 Wellness Summit Framework Synthesized Notes (Appendix A).

What can CUCSA do?

This workgroup feels that CUCSA is a critical conduit between Office of the President and the campuses. Creating a culture of wellness can start with us! We recommend that CUCSA

- Incorporate wellness into each of our quarterly meetings. This can be done through speakers, healthy meeting food options, and movement breaks.
- Continue to represent local Staff Assemblies as part of the UC Wellness Summit group.
- Incorporate wellness program updates as part of the campus update process and work with delegates to report this back to their location.

Emotional Health Recommendations

The UC offers a wide range of resources to help staff remain emotionally healthy and assist staff when needed. In order to raise awareness and help staff find these valuable resources, we recommend that

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- locations consider creating a Wellness portal to assist staff in finding wellness-related services and resources available to them (UC, campus-specific, and external) and notify system-wide Human Resources so they can update the location links on the UC Living Well website;
 - the Wellness portal and/or primary wellness programs follow Davis' and Irvine's example and include links to Berkeley's Greater Good Science Center, the UC Well-being Channel, and other unique resources available throughout the system; and,
 - local staff assemblies help raise awareness of the services and resources available to staff through their websites and other communication channels as appropriate.

Home-life/Personal Care Recommendations

Standards across the UC system seem to be a key component in making employee services and benefits equitable, inclusive, robust, usable, functional, measurable, and successful. To provide a solid package of benefits to employees, we recommend that Office of the President

- commit to a long-term evaluation and sourcing of child care services for employees at all locations, with funded mandates that provide standardized, affordable, and accessible services to employees;
- provide transparent and yearly utilization and return on investment analysis for outside employee sponsored services such as Bright Horizons Care Advantage™;
- convene an updated committee of Work-Life coordinators (and fund positions if they do not exist) from every location, with a commitment to create standards of service in work-life balance programming across the UC system (such as the wellness minimum standards) using best practices from existing programs and an understanding of consequences when standards are not met;
- utilize a more robust work-life coordinator cohort to expand and generate resources in a centralized fashion to employees; for example, provide a one-stop-location for elder care resources that incorporates the best content from existing content combined with UC wide research data, studies, and opportunities, harnessing every aspect of what the UC system already has expertise in;
- create the culture and provide the resources competencies across employee service units that work-life balance is a requirement, not an option, in supporting a healthy workforce.

Job Flexibility Recommendations

- Standardize and clarify the eligibility for staff to participate in flexible work arrangements systemwide. This will help minimize the misperception of inequity
-



among staff, since staff must meet minimum eligibility requirements and be in an eligible job type in order to be considered for participation.

- Educate department heads and supervisors on the benefits of job flexibility and on the process for putting flexible work arrangements in place. Many of the campuses, such as Berkeley, San Diego, Davis, and Irvine, already have robust programs, processes, and resources in place that can be used as models.
- Locations should create central repositories of all flexible work agreements, which can be used as a benchmarking tool for measuring employee wellness and engagement.
- Individual supervisors should consider requests based on the needs of the unit and the nature of the employee's job and be trained on how to clearly explain their reasoning to prevent conflicts or grievances, how to manage remote workers.

Financial Well-being Recommendations

Please review the Financial and Retirement Literacy and Awareness workgroup report as it will provide more detailed information, but below are some additional recommendations from this workgroup.

- More support needs to be offered at all campuses including providing food closets like Los Angeles, providing CalFresh assistance like Davis, or the INSIGHT Employee Assistance Program like Merced.
- Educate supervisors, managers and staff on financial literacy, awareness and its effects on well-being.

Additional Recommendations

- Local staff assemblies that are not already involved in work-life balance programs should work with HR departments to create a Wellness Committee at each location and build strong relationships.
- A general tool, such as a survey, could be created with the assistance of the UC's Institutional Review Board, and administered by Risk Services or HR to determine precise areas of need.
- Specific training for supervisors and managers on topics including flextime, telecommuting, financial well-being and work-life balance need to be implemented. In addition, include specific language in performance evaluation forms such as "Ensures employee is aware of work-life balance ideals such as retirement information, telecommuting, flextime, and wellness initiatives."

We must prepare for a long-term engagement with staff; one-time explanations during onboarding or open enrollment doesn't lend itself towards meaningful engagement. Finally,



concentrating on transparency will increase communications and build the trust necessary for staff to engage in their own well-being.

Appendix A

UC Living Well Wellness Program Minimum Standards Framework

Implementing and expanding evidence-based workplace health promotion/wellness programs will offer the University of California the opportunity to improve the health and productivity of our UC population. Evidence shows that workplace health programs have the potential to influence social norms; establish health-promoting policies; facilitate healthy behaviors; improve employees' health knowledge and skills; help employees get necessary health screenings, immunizations, and preventive care; and reduce on-the-job risks and injury.

Research reported by the CDC has shown that the most effective way to promote wellness is to "...implement an evidence-based comprehensive health promotion program that includes individual risk reduction programs, coupled with environmental supports for healthy behaviors, and is coordinated and integrated with other wellness activities."

Based on location and available resources, UC Living Well (UCLW) has established a wellness program minimum standards framework for a comprehensive Wellness Program at all UC locations. The framework is detailed below and includes programmatic and culture of health interventions that target UC's top risk areas and high cost claims. The standards are based on best practices, evidence based strategies and aligned with CDC scorecard, UC's current tool for wellness program evaluation. These standards are to be implemented over time under the Wellness Program Manager in partnership with other key stakeholders including: Employee Assistance Program (EAP), Human Resources, Work/Life, Recreation, Safety, Ergonomics, WorkStrong, UC benefit plans, etc.

(* Designated as recommended minimum standards).

	Programmatic	Culture of Health Initiatives
Organizational Support (provided by UCOP)	☐ Health Risk Assessment ☐ Health & Productivity data* - Location and systemwide - HRA, medical/workers' comp claims, risk stratification, risk prevalence, etc.	☐ Leadership support* ☐ Incentive/Reward ☐ Systemwide Wellness Program Manager
Organizational Support (Campus/Health System)	☐ Needs Assessment/interest survey* ☐ Annual Program Plan* ☐ Budget* ☐ Evaluation of programs*	☐ Health Promotion/Wellness Coordinator* ☐ Health Promotion/Wellness Committee* ☐ Mission Statement for Wellness Program* ☐ Wellness Coordinator systemwide workgroup*
Wellness Communications	☐ Promote UCLW wellness initiative* ☐ Promote and encourage taking the Health Assessment/Coaching (from wellness vendor)* ☐ General Communication Strategy/Plan* Newsletter, program promotion, flyers, website, etc.*	☐ Guide to Wellness at UC

	Programmatic	Culture of Health Initiatives
Physical Activity	☐ Education on benefits of physical activity* ☐ Annual UC Walks* ☐ Behavior change program/activity challenges* ☐ Promotion of lifestyle counseling/coaching resources* ☐ Organized group activity programs (other than the exercise facility) ☐ Promotions or participation in surrounding community walk, run/bike events	☐ Walking Program* ☐ Promote onsite exercise facility, programs, services* ☐ Promotion of the alternative transportation (walk/bike to work) in partnership with Parking and Transportation* ☐ Marked or posted walking routes or maps ☐ Walking/Standing meeting guidelines ☐ StairWell initiative ☐ "Move More" campaign ☐ Bike sharing program ☐ Sneaker/Workout attire to work days ☐ Environmental support for exercise (fitness stations, track, walking maps, bike racks, etc.) ☐ Reimbursement program for purchase of personal fitness tools/equipment ☐ Sit/Stand workstation ☐ Incentives for physical activity "physical fitness comp time", gift certificates, workout kits, etc.
Healthy Eating	☐ Education on healthy eating and nutrition-related topics* ☐ Annual Food Day activities* ☐ Behavior change programs/challenges* ☐ Promotion of Lifestyle counseling/coaching resources*	☐ Healthy Meeting and Events Guidelines* ☐ Promote/organize Healthy Eating/Nutrition standards for vending, catering, retail, residential, and other food venues ☐ Promote and/or organize Hydration Stations ☐ Subsidy or discount on healthier foods ☐ Promote and/or organize CSA's and Farmers' Market ☐ Healthy Food and Beverage Policy ☐ Dedicated space for demo/teaching kitchen
Weight Management	☐ Education on weight management* ☐ Behavior change programs/challenges* • i.e. <i>Maintain Don't Gain</i> ☐ Promotion of lifestyle counseling/coaching resources*	
Tobacco	☐ Education on tobacco use* ☐ Promote/offer Cessation services* ☐ Awareness Campaigns (ex: GASO) * ☐ Promotion of lifestyle counseling/coaching resources *	☐ Smoke/Tobacco-Free Policy*



	Programmatic	Culture of Health Initiatives
Stress Management/Mental Health <i>(Initiatives in collaboration with EAP and/or Work/Life, etc.)</i>	☐ Education on topics such as Depression, Mental Health, Mindfulness, etc.* ☐ Depression/Mental Health Assessment ☐ Training for supervisors on workplace stress and depression	☐ Dedicated space for relaxation activities (i.e. meditation, yoga, biofeedback) ☐ Support local social/team-building activities (i.e. staff picnic, faculty/staff sports teams, holiday party, etc.) ☐ Influence opportunities for employee participation in decisions on work processes, etc. i.e. collaboration with training, HR, etc.
Wellness Champion/Culture	☐ Wellness Ambassador/Champion Program*	☐ Wellness Toolkit/Training for Managers and Supervisors ☐ Healthy Department Certification
Screening/Preventive Care <i>(Initiatives in conjunction with UC benefits plan)</i>	☐ Flu education and/or vaccination* ☐ Promote preventive care with health professional* ☐ Know Your Numbers Health Screenings	
Financial Wellness <i>(Initiatives in collaboration with Fidelity, Work/Life, EAP, etc.)</i>	☐ Promote/offer Financial Education resources*	☐ Financial Counseling*
Chronic Conditions (Cardiovascular and Cancer) <i>(Initiatives in collaboration with UC benefit plans)</i>	☐ Promotion of resources for chronic conditions* ☐ Promotion of lifestyle counseling/coaching resources* ☐ Behavior Change Programs focused on Diabetes, Heart and Stroke, Cancer, Cholesterol ☐ Onsite Health Screenings - Body comp, BMI, blood pressure, cholesterol, glucose, bone density, etc. ☐ Warning Signs/Symptoms campaign - i.e. heart attack, stroke	☐ Blood Pressure kiosks
Injury Prevention/Musculoskeletal <i>(Initiatives in collaboration with Ergonomics and WorkStrong partnership)</i>	☐ Injury Prevention/Education* Osteoarthritis/Musculoskeletal ☐ Injury prevention fitness program	☐ Organized Activity/Fit Breaks ☐ Sit/Stand workstations
Work-Life	☐ Education on child care, eldercare, tuition subsidy or reimbursement*	☐ Wellness Time policy
Lactation Support	☐ Education on Breastfeeding	☐ Accommodations for Nursing Mothers Policy* ☐ Lactation Rooms* ☐ Access to hospital-grade breast pumps

	Programmatic	Culture of Health Initiatives
OCC Health & Safety <i>(Initiatives in collaboration with EH&S, Occupational Health, WorkStrong)</i>	☐ WorkStrong program* ☐ Health and Safety partnership (training for supervisors, health and safety committee, Safety Spotlight)	☐ CPR/AED program

Recommendation

In order to meet these minimum wellness standards, we require at least:

- ☐ 1 FTE Wellness Program Manager dedicated to each location
- ☐ Wellness advisory committee
- ☐ Wellness program start-up budget