



LOYOLA
UNIVERSITY
CHICAGO

Policy on Workplace Strategies

1. Audience

The primary audience for this Policy is School/Unit leaders, Managers, Administrators, and applies to all full and part time staff.

This Policy does not apply to staff employees covered by a collective bargaining agreement, unless otherwise set forth in such an agreement.

2. Owner

Human Resources (HR)

3. Effective Date

This updated Policy goes into effect September 26, 2022.

4. Policy

At Loyola University Chicago (Loyola/LUC), we are called to transform lives through our teaching, learning, and research. Together on our campuses, we pursue educational innovations and leverage the Ignatian traditions to make education accessible to all and enhance the success of our student body through active collaboration, shared experiential learning, engaging co-curricular programs/activities and the pursuit and dissemination of new, interdisciplinary and translational knowledge.

Loyola is a campus-based community where the daily interaction between students, faculty, and staff on our campus(s) and our local and global communities is foundational to our teaching, learning and research and demands that we are present and actively engaged with one another. Even in offices or Departments that indirectly supports or enables our teaching, learning and research we require an on-campus presence to serve those students, faculty, staff on-campus. Our presence on campus together facilitates building up our workplace culture, fosters the development of on-going long-term relationships and teamwork.

No matter what workplace strategies that certain roles and responsibilities might allow, it is up to School/Unit leaders and Managers to ensure their Unit meets all objectives and service standards, set performance expectations, and ensure compliance with this and other workplace policies. It is also incumbent on Leaders and Managers to attend to their staff's engagement and well-being, personal and career development and empower staff to do their best work individually and as a team.

This Policy establishes a common, ongoing framework with shared definitions, within which School/Unit Leadership can implement various Workplace Strategies in accordance with their operational needs.

5. Definitions

The following definitions are established for the purpose of this Policy to ensure consistent and standardized term use in University discussions and Policy administration.

School/Unit Leaders	Deans, Vice Presidents, for the purposes of proposing / approving defined Workplace Strategies and Workplace Strategy Plans in the School or Unit.
Managers	Those in roles responsible for supervising staff employees.
Workplace Strategies	Alternative approaches to traditionally structured, in-person work in an employer-designated location within designated work hours or shifts. Workplace Strategies enable Schools and Units to consider different ways of utilizing physical workspaces, technology, and other tools to support how employees perform their work and interact with colleagues, students, and visitors. Workplace Strategies may be implemented for an individual/team/Department by a School/Unit Leader. Workplace Strategies can be combined as necessary to meet the needs of the School/Unit.
Workplace Strategy Plan	Workplace Strategy Plan developed and documented by a Manager that applies to an individual, team or Department. The Plan includes a set of clear parameters and expectations for participating employees.
Seasonal Arrangements	Workplace Strategy applied during a certain season or time of year, such as during the summer or during breaks between academic terms.
In-person	Where work performed at a Loyola University Chicago campus workplace (LSC, WTC, HSC, JFRC, Cuneo, LUREC), or an approved site (Clinic, School, etc.).
Shift Work	Where work performed all twenty-four hours of the day and each day of the week, divided into shifts with set periods of time.
Remote Work	Where work performed from a location other than a traditional, employer-designated campus workplace or an approved site (Clinic, School, etc.) for a portion of work time.
Hybrid	Where work performed partially in-person and partially remote (e.g., either a weekly schedule of four (4) or three (3) days in-person and one (1) - or two-days (2 days) remote work) and in most circumstances requires the review and approval of applicable Sr. Vice President, Provost, or President.
Hybrid-Seasonal	Seasonal Arrangement where the in-person and remote work schedules fluctuate based on the nature of the work and the time of year (e.g., student-facing roles where more in-person work is required during the academic year).

Fully Remote Work	Where work performed remotely at an approved off campus location and in-person presence is only occasional or “as needed.” With Loyola’s campus-based community, this arrangement is available only in limited and the rarest of circumstances and in all circumstances requires the review and approval of applicable Sr. Vice President, Provost, or President
Flextime	Where a staff member’s work hours may be set earlier or later than the standard work hours for the Department while still maintaining a high level of service during the peak operating hours (e.g., 10:00AM to 3:00PM office hours).
Compressed Workweek	Where work performed in longer daily hours over fewer workdays (e.g., instead of working five (5) eight-hour (8 hour) days per week, employees might work four (4) ten-hour (10 hour) days per week).

6. Procedures

a. Criteria for Determining Eligibility for Workplace Strategies

School/Unit Leaders should use the following criteria to determine position eligibility for Workplace Strategies:

- i. **The default work modality for the majority staff is primarily in-person ****
(e.g., School/Unit Leaders, College and Schools, Student Development, Student Academic Services, Enrollment Management, Athletics, Campus Ministry, Facilities, Campus Safety, etc.).
 1. **Any exceptions to primarily in-person in these areas requires the review and approval of applicable Sr. Vice President, Provost, or President.**
- ii. Alternative Workplace strategies should only be considered and proposed if the School/Unit Leader can ensure that the same or more work is getting accomplished just in another time, in another place or in another way.
- iii. Alternative Workplace Strategies should only be considered and proposed if we can ensure appropriate levels of interpersonal interaction with clients, colleagues, subordinates, and Supervisor to optimize teamwork, along with building and maintaining healthy workplace relationships.
- iv. Alternative Workplace Strategies should be job appropriate, operationally viable and legally compliant.
- v. School/Unit Leaders may determine that certain positions are ineligible to participate in certain types of Workplace Strategies depending on the nature or classification of the position, the work required, or the academic, business, and/or operational needs of the School or Unit.
- vi. An employee’s performance will be considered before establishing and when modifying or maintaining any Alternative Workplace Strategies.

vii. When determining the extent to which roles and responsibilities can be performed on a remote basis and/or how many days the individual will work in-person and on-campus, **School/Unit Leaders should consider the following criteria:**

1. Degree to which the work requires in-person interaction with other members of the Loyola community, visitors and public.
2. Whether the responsibilities of the role can be effectively performed from an off-campus location.
3. Degree to which measurable outcomes and objectives of the role and responsibilities can be achieved with the proposed Workplace Strategies.
4. A candid assessment of how much in-person interaction is needed with colleagues, subordinates, and Supervisor to optimize teamwork, along with building and maintaining relationships.
5. Market-based demands for/access to talent.
6. Unique or niche skills, not otherwise readily available in the local market.
7. Other operational, business-critical circumstances or academic needs.
8. Equity (e.g., whether other staff members in similar roles on the same team are permitted to work remotely).

*****Please Note: proposed deviations from any of the defined Workplace Strategies, requires the review and approval of applicable Sr. Vice President, Provost, or President.***

b. Equitable Decision-Making

School/Unit Leaders are expected to make decisions equitably and without regard to employees' protected characteristics or activities. All Workplace Strategies are to be assessed via a fair, consistent, and transparent process. However, equitable consideration does not guarantee identical Workplace Strategies for every employee. School/Unit leadership decisions to exclude specific positions/roles from participating in Workplace Strategies are subject to the application of Loyola's policies against discrimination and retaliation.

c. On-Going Assessment of Workplace Strategies

Newly implemented Workplace Strategies should begin with a 30–90-day trial period to assess feasibility. School/Unit Leadership and managers should review and assess the Workplace Strategies regularly during the trial period to ensure they fully support academic, operations and business needs and, if necessary, adapt these Workplace Strategies accordingly. Established and ongoing Workplace Strategies should be reviewed and updated as academic, operations and business drivers change and, at a minimum, annually. The Workplace strategies must be rooted in the necessary outcomes and objectives of the School/Unit, roles, and responsibilities of the position, and where possible should be responsive to the changing needs of the workplace.

Workplace Strategies are not permanent or otherwise guaranteed to continue for any period of time. School/Unit Leaders retain the discretionary authority to change or revoke Workplace Strategies (either temporarily or permanently) as needed, either for business or operational needs, special work functions or activities, seasonal variations in work volume, or for performance-related reasons. In the event a Workplace Strategy is revised or revoked, reasonable advance notice to the employee of at least 30 days is preferred. However, in certain circumstances, Workplace Strategies may be changed or revoked without prior notice. School/Unit Leaders and Managers are expected to consult with Human Resources prior to revoking a Workplace Strategy.

d. **Occasional or Temporary Workplace Strategies**

Workplace Strategies may be instituted occasionally as temporary arrangements based on either operational or individual employee needs, subject to the approval of the Manager (e.g., an in-person employee transitioning from a leave may request to work a Flextime schedule for their first week back to work or remote work for a portion of that first week). See [Flexible Schedule Policy](#).

e. **Workplace Strategy Plans for Departments or Teams**

Managers may develop and implement a team/department-wide Workplace Strategy Plan, subject to the approval of the School/Unit Leader. The Workplace Strategy Plan form is a tool intended for planning, communication, approval, and documentation purposes. Form for [Unit/Department/Team Workplace Strategy Plan](#).

f. **Workplace Strategies for Individuals**

Staff members may request individual Workplace Strategies. Workplace Strategies must be approved by the Manager and the School/Unit leadership. While individual needs may factor into some proposals, the approval or denial of all requests must be based on academic, business, and operational needs, not the individual reason for the request.

Managers should not ask about an individual's personal circumstances beyond what the employee voluntarily discloses. If a staff member reveals their request is based on personal health reasons or a disability, the request must be referred to Human Resources for appropriate handling consistent with the University's Reasonable Accommodation Policy. See [Reasonable Accommodation Request Process](#).

g. **Documentation Requirements**

School/Units are responsible for tracking and documenting Workplace Strategies. Approved formal Workplace Strategies can be documented via the Workplace Strategy Plan (for teams) and stored with the Manager and/or School/Unit leader. These documents should be filed and available to Human Resources. Occasional or temporary flexible arrangements do not require formal documentation but require approval from the Manager and expectations should be clearly set forth in writing (e.g., an employee who normally works on-site

requests and is approved by their Manager to work from home for one day to meet a repair person).

7. Expectations for School/Unit Leaders and Managers

School/Unit leadership and Managers are encouraged to have open dialogue with staff regarding the continuation and/or implementation of Workplace Strategies in their environments as part of their business and talent strategies. Managers must document and clearly communicate expectations for work assignments, check-ins, and any other parameters related to supporting the utilization of a Workplace Strategy.

Typical topics should include:

- Expectations and measurement of objectives and outcomes of the role.
- Frequency and type(s) of required in-person meetings.
- Frequency of 'check-in' meetings with immediate supervisor.
- Responsiveness expectations (e.g., via email, telephone, Microsoft Teams, and other communication platforms).
- Other communication expectations with team members, internal stakeholders, external contacts, etc.
- Availability and hours expectations.
- Core hours during which all or most employees are required to be in-person.
- Areas of focus during Remote Work.
- Enabling Technology requirements are met (e.g. computing, telephony, etc.)
- Confirmation that the Workplace Strategy is subject to change.

8. Work Based Outside of The State of Illinois

- a. In the rarest of circumstances and only with HR's prior approval, can you hire or reassign an employee who will, due to the nature of a particular position or business needs of the University, need to reside and perform their work in the U.S., but outside of the State of Illinois. School/Unit Leaders and Managers are expected to refer to the above Decision-Making Guidance Regarding Remote Work when considering offering employment to or proposing a current employee to work on a virtual basis. When an employee's permanent place of work is outside the State of Illinois, that State's employment laws must be followed. School/Unit Leaders and Managers must consult with Human Resources on these rarest of situations.
- b. For tax purposes, Human Resources must be notified at least 60 days in advance if an employee is approved by their School/Unit to perform work in the United States from a location outside the State of Illinois. It is the responsibility of the employee and their Manager to notify Human Resources and complete any tax documents as advised by Human Resources. The employee is also responsible for updating their home address at [Employee Self Service](#).
- c. The University is not an authorized employer outside of the United States except for our sponsored international academic programs in Italy.

9. Key Off-Campus Work Policies/Procedures

a. Health & Safety Hazards

Employees are responsible for maintaining remote work areas in a manner free from health or safety hazards that could endanger themselves or others. If an injury to an employee occurs at their remote worksite, the employee must notify their Manager of the injury in accordance with the University's [Workers' Compensation Policy](#). The University reserves the right to inspect employees' Remote Work areas for security, health, and safety purposes.

b. Appropriate Workspace

In order to facilitate a staff member's success in any Workplace Strategies the following space guidelines should be helpful.

- i. An employee is responsible for maintaining a clean, safe and distraction free workspace off campus. An employee may not hold in-person work meetings in a private residence.
- ii. University workspace must be allocated to its highest and best use for teaching, learning and research. Offices with any remote work should be prepared for reduced, re-configured or shared workspace that facilitates workplace strategies success and stewards our finite space resources.
- iii. To better utilize limited workspace on campus, Schools and Units are encouraged to consider how to leverage existing office space as a result of staff working a remote schedule.
 1. Anyone working three (3) or more days on campus will likely have designated space but may have shared office/workspace on campus.
 2. Anyone working less than three (3) days per week on campus – should be the rarest of exceptions - and will not have a designated office/workspace but hoteling space (either in the current office footprint or a University location will be available).

c. Equipment

Schools and Units will not purchase office furniture (e.g., desk, chair, file cabinets, etc.) for home offices. Employees who procure discretionary equipment or services to perform their job may not be reimbursed for such expenses. Employees who are required to purchase certain equipment or services to perform their job shall be reimbursed for such expenses, provided that they are incurred and that reimbursement is sought in a manner consistent with the University's reimbursement policies and practices.

The School/Unit will not be responsible for operating costs, home maintenance, property or liability insurance, or other incidental expenses associated with remote work employees' use of their personal residences or other Remote Work locations to perform work. Unless otherwise required by law or agreed to in writing prior to any loss, damage, or wear, the University does not assume liability for loss, damage, or wear of employee-owned equipment.

See [University Travel and Business Expense Policy](#).

d. **Meeting Standards and Expectations of Performance**

Remote work like any other work must meet established standards of service, ensure availability during scheduled work hours, fulfill job requirements, and deliver desired outcomes and results. The focus of the remote work must remain on job performance, professional decorum and meeting organization demands. The expectation during any remote work is that you are able to devote your full time attention to your assigned work. Any remote work is not a replacement for on-going and regular childcare, elder care, or other employment during scheduled work hours.

e. **Remote Employee Travel**

An employee who elects to reside in a place other than near the location of their Loyola Department and is authorized to work remotely is responsible for expenses for any travel required for in-person meetings and events at the location of their home Unit.

This section clarifies the University's policy regarding remote employee travel and the related tax treatment. Depending on the circumstances, reimbursement of travel expenses may be taxable to the employee. An important factor in this determination relates to whether the employee's "**tax home**" is a Loyola University Chicago campus workplace or the employee's home.

Per the Internal Revenue Service, "an employee's tax home identification is critical, as the employee must be considered away from their tax home for reimbursements of travel expenses (including meals and lodging) to be allowable and excludable from income." Unless the **University has required** an employee to work from a specific non-campus location, one of the Loyola University Chicago campuses will be considered an employee's **tax home**.

Remote location elected by the employee: An employee who elects to work in a location other than the location of a Loyola University Chicago campus workplace and is authorized to work remotely (fully remote or hybrid) is responsible for travel expenses for any in-person meetings and events at the Loyola campus location of their home Unit.

In this situation, the employee's "tax home" is considered the Loyola campus and not the employee's home. Travel between the employee's home and a Loyola campus workplace is considered a commuting expense and therefore not reimbursable.

Example: An employee elects to work remote but is requested to come to a Loyola University Chicago campus for in-person quarterly meetings, those travel expenses are the responsibility of the employee as a commuting expense and therefore are not reimbursable.

Remote location required by Loyola: An employee hired to work at a specific location (other than a Loyola University campus) by virtue of their job duties, may travel to a Loyola campus for periodic meetings. In this situation, the employee's "tax home" is considered the employee's home and not a Loyola campus. Travel-related expenses will be reimbursed, as the employee is considered away from their tax home and traveling on business.

Example: An employee is hired to work in California at the request of Loyola. The employee works in student admissions and tasked with recruiting students in the west coast geographic region. If the employee is requested to be in the State of Illinois for in-person quarterly meetings, those travel expenses are considered a business expense eligible for reimbursement by the University. The travel expense reimbursement does not give rise to any taxable income to the employee. The reimbursement will not be included on the employee's W-2.

For additional information on the payroll consequences of remote employees, please review the Out-of-State Employees information [page](#).

Remote Employee Travel^(a) Reimbursement Summary

Remote Employee Type	Tax Home Identification	Employee Reimbursement available for travel to LUC?	
Remote location elected by the employee	LUC campus workplace	No. Travel expenses are the responsibility of the employee and are not eligible for reimbursement.	
Remote location required by Loyola University Chicago	Employee's Home	Yes. Travel to LUC is considered University business travel.	
(a) Travel includes costs related to all modes of travel (car, bus, train, air, taxi, etc.), as well as meals and lodging. Travel expenses are subject to the University's Travel & Business Expense policy . Policy exceptions are included in the employee's W-2 as taxable income to the employee.			

f. Property Insurance

University insurance will not cover any personal property that is used off campus and will only cover University equipment brought to an authorized off-site location.

g. Information Security & Confidentiality

Access to the University's network by any equipment or means is always subject to the provisions of the policies on Information Security. See [Information Security Policy](#).

Employees must protect University information from unauthorized access, disclosure, or damage and comply with federal, state, and University rules, policies, and procedures regarding access, disclosure, and/or destruction of official University records. Under a Remote Work arrangement, the employee is responsible for ensuring that all forms of information (e.g., paper, electronic, conversations) are kept secure and confidential to at least the same degree as when the employee was/is working at a traditional University worksite. While working under any modality of Workplace Strategies, employees must follow University-approved security procedures to ensure confidentiality and security of data.

h. **Technology**

See ITS recommendations for secure computing and telephony when working off-campus and the essential tools for collaboration and productivity for every Workplace Strategy. See [ITS Guide for Remote Work](#).

i. **Other Policies**

All alternative workplace strategies must comply with the University's [Intellectual Property and Transfer Policy](#) and other [University Policies](#).

10. Questions or Consultation about Workplace Strategies

School/Unit Leaders, Managers, and employees may seek consultation with Human Resources regarding potential or existing Workplace Strategies.

Approved: 9/23/22 (Revised: 11/30/23, 12/11/23, 2/23/24)