ISA TEAM OVERTIME MANAGEMENT - APPROACH (Revised Sept 23, 2014)

Objectives:
1. Account for overtime and billing appropriate accounts
2. Reduce overtime for specific functions (8:30 - 4:30, 5 day workweek)
3. Address the expanding workloads - greater number of students and range of contracts/projects
4. Approach/mechanism to rationalize and standardize overtime required
5. Pre-approval of overtime - mechanism

PART 1: RATIONALE FOR OVERTIME REQUIREMENT

Category	Category A	Category B	Category C
	Requirement of the position - Established	Anticipated overtime resulting from additional demands	Unanticipated overtime resulting from additional demands

Demands from	1. Reception service (airport/bus)
	
	2. Orientation Week
	
	3. International Days
	
	4. Student emergencies, crisis (medical, legal, etc.)
		1. Hosting guests, delegations
		2. Responsibilities/tasks related to short term programs - over and above the ISA role - not able to be addressed in available time.
		3. Additional assignments: translations, project work, marketing, etc.
		4. Training of new staff
		5. Covering for team members on holidays, on marketing missions, and addressing other duties
		6. Working on a special project - agreed it needs to be done within a specified period
		7. Required meetings (will need to alert meeting organizer to overtime situation)
		8. Participating in Student/Club events
			1. Catching up on work as a result of absence (days off)
			   o Ideally would try to avoid if possible - pace work over longer period of time
			   o Plan to build in time for catching up. (Block in additional time on return)
			
			2. Not making a deadline
			   o Ideally would plan to begin project or initiative soon enough such that the job can be done without overtime

Approach	1, 2 & 3 : Pre-approved already for the tasks given by supervisor. 4 : **Urgent approval required -** Request to supervisor by phone.	Anticipated impact on workload : **Pre-approval required** – Request to supervisor. Log detailed reason for O/T on Timesheet.	**Pre-approval is required** and only provided if there is no alternative.

Judgment calls on overtime:

Work day: 8:30 - 4:30

1. Is this something that the institution (student fees) should pay double time to address?
2. Can it be done the next day?
3. Student service impact. Am I able to draw the meeting to a close.
   a. "I'm sorry, I only have 15 minutes. Is that enough time, or can you come back tomorrow?"

        b.   I have several students waiting. I think we've addressed your issues. I'd love to visit, but perhaps we could do this later this week…

4.   Consequences for not addressing it immediately.
5.   Over-committing oneself: Identify when project/workload cannot be done during assigned times.
6.   Can a colleague take this on for me?

Approach When Asked to Host Guests

1.   For team members who are in our CUPE union, we will try to avoid booking time that requires overtime.
2.   Will try to schedule time such that lunches are involved rather than dinners, if hosting is involved. However if requested to attend a dinner, overtime will be paid.
3.   Volunteer to attend social events: Individuals may indicate a desire to join a dinner/social voluntarily (outside of work hours). If so, the assumption is that there is no overtime to be paid in this context. The cost of your meal is paid.

PART 2: STUDENT SERVICES

▪ **This is a priority for TRU World.   The ISA primary role is to serve students.**

▪ **Method to create a more sustainable student service model:**

1. **Block lunch hours and "administrative work" hours**

2. **Provide flexible coverage for student drop-ins**
Our lunch hours and blocked time are appropriately staggered.

3.   **Drop-in approach: Service Orientation**
Flexibility of advisors: If the Advisor requested by the student is not available (at lunch, in administrative or meeting time), the student will be encouraged to see any ISA blocked in for student drop in at that time.
"I'm sorry, X will not be available until Y time. Could A, B or C help you? Let's see if A, B, or C can give you some guidance on this.

Visit also can include follow-up: Some students require immediate follow-up with instructor/other.   The meeting time will extend beyond the actual time the student is in the office, in order to give the advisor time to make notes on the follow-up or to send a quick e-mail.   The ISA will let the receptionist know if this is the case, so waiting students and reception are alerted to the wait-time.

Provide forms directly to students: If a student is only waiting for a form, our reception can direct to another advisor to provide the form and instructions to the student.

If there is a backlog of students, ask students to indicate their purpose of visit. (Meeting chit - Name/purpose)   The advisor can respond to the group more efficiently. (If two or more students have the same issue, they can be assisted as a group.)

Website and handouts for frequently asked questions. Examples:
     1.   Steps to extend your student authorization
     2.   Steps to terminate your homestay, etc.

4. **Provide students with a Drop-In or ISA Outreach Service Schedule, indicating drop-in times for their designated advisor.**
    a.   students anticipate availability and plan their visits accordingly

b.   option to communicate on voice mail
c.   option to communicate by e-mail

5. **Phantom day after holidays of over five days or more.**
   a.   ISA's book themselves off for a "Phantom Day" to get caught up on work/emails, the first day back from holidays.   (This day, the advisor does not see students if at all possible.)

6. **Department Reception issues: Mark it on your calendar**
   a.   Reception needs notice of changes in time in advance
   b.   Team members must let Reception know of meetings/time away from the office. If late in returning, phone to indicate when to be expected.
   c.   During the drop-in time, advisors should make themselves available to see students. (try not to finish administrative work and keep students waiting during this drop-in period)
   d.   Directing student to specific advisor would benefit from more flexibility. If one ISA is absent/unavailable, another advisor can see the student.

7. **Introduce Information Workshop Series on FAQ**
   a.   Student directed to attend the information session (Weekly CIC workshops) rather than get one-on-one direction from ISA (unless it is urgent) on specific topics:
   b.   Examples:
      FAQ: VISA/Study Permit Renewal, Off Campus Work, MSP, etc.
      Important Knowledge: Plagiarism, Safety, Intercultural Communications
   c.   This needs to be done sensitively so the student do not misinterpret this as a lack of willingness to assist.
   d.   Schedule of workshops should be handy at the reception desk.

PART 3: MISCELLANEOUS ITEMS

A. Procedure for time taken off for medical appointments:

1.   Let the following know you will not be available (period of time):
   a.   ISSS (Eric) - will make a note - to ensure it is captured accurately into paysheets
   b.   Reception (change in availability - when will you be available)
   c.   Colleagues

2a.   Accounting for appointments. Some options:
   a.   account for the time away as sick time
   b.   make up the time later that day or the next day
   c.   if at all avoidable, not to do overtime to make up for time away

2b.   For other appointments. Ideally avoid during work hours, but if necessary. Some options:
   a.   account for this time as holiday time/or time-in-lieu
   b.   make up the time later that day or the next day
   d.   if avoidable, not to do overtime to make up for the time away

B. Extended Lunch Hour Option

Background: The extended lunch hour option was introduced in the mid- 1990's to accommodate the stress in the ISA schedule due to heavy demand and number of ISAs. At that

time ISA team members were rarely able to take their breaks.   To accommodate this reality, TRU permitted the extended lunch hour for the ISA role.

Approach to combined schedule:
Combine two 15-min breaks with a 1 hour lunch = 1.5 hour lunch
No breaks during the day.

OPTION TO CHANGE TO REGULAR SCHEDULE:
Some team members may find that due to their health/well-being, they must have an opportunity to rest or eat; must have breaks.

Option to adopt a typical schedule:
Take two 15-min breaks (morning/afternoon)
Take a one hour lunch

Guiding Principles regarding the ability to have the extended lunch model:
- It is not possible to combine the two models, take breaks and have an extended lunch
- Individuals sensitive to not be perceived by their colleagues as taking breaks and taking an extended lunch:
  - Food preparations (heating food, cutting food, making toast) – this is considered a break.
  - Eating of meals at desk.
  - If one wants to have their breakfast at work, do so prior to 8:30.

Appreciation for flexibility:

There may be days when there are exceptions; private conversations with colleagues or friends or personal emails which are done on work time.   It is expected that the individual will take this into account when claiming overtime and addressing their overall work day.

PART 4: PRE-APPROVAL FOR OVERTIME *(Draft)*

Name: _____

Date: _____

Request for Upcoming Overtime:

    Period of time or date: _____

    Reason for need for additional time: _____
    _____
    _____

    Date and Number of hours: _____

Budget code for billing:
___ ISA Student Support
___ Project (specify) _____
___ Study Abroad

Approval by your direct supervisor: _____

    - Identify specific reason for overtime
      If TRU Administration requested justification, the reason
      explains why TRU would agree to pay overtime for this task
      (rather than address the next day).