

Title: SCHEDULING REVIEW COMMITTEE REPORT

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Best Practices and Guiding Principles for Scheduling Staff at EPL

As agreed to in the Letter of Understanding #6, dated 17 December 2009, a Scheduling Review Committee was established to review guidelines on scheduling. Committee membership consisted of three members representing the Edmonton Public Library (Tiina Payson, Louise Reimer, Janice Sabourin) and three members representing Civic Service Union 52 (Patti Barnes, Gail Petryk, Kyle Smith).

To gain a clearer understanding of some of the concerns and interests related to scheduling practices two surveys were conducted: one sent by email for the schedulers at each service point and one sent by Survey Monkey to all staff. Key issues identified from survey responses were: ensuring both service and operational requirements are met; keeping lines of communication open between staff and schedulers and managers; perceptions of fairness in scheduling practices; need for applying flexibility in scheduling; and applying compassion to support staff in emergent difficult situations.

Using an interest-based approach, the Scheduling Review Committee developed recommendations regarding guiding principles, best practices, and roles and expectations.

Scheduling is a systematic way of planning the necessary or appropriate number of staff and levels of staff required to provide the quality of customer service and community involvement to which Edmonton Public Library is committed.

In support of this, the following information has been compiled to reflect the interests and needs of management and staff:

1. Guiding Principles
2. Best Practices
3. Roles and Expectations in Scheduling
4. Special Considerations

Spread the words.

1. Guiding Principles:

The primary driver in setting schedules is operational needs which take into account the flow and distribution of work, which in turn ensures quality customer service.

It is important to seek creative and flexible solutions, when possible, to respond to employee needs.

Allow scheduling decisions to be guided by principles of equity, consideration for staff, and quality customer service.

Open communication and consistency of application are foundational for effective scheduling practices.

Do your best to accommodate unforeseen and unique events: be open to staff needs and reasons; respect confidentiality.

Retain a high degree of flexibility when scheduling community librarians; consider allowing them access to the scheduler to increase their ability to modify schedules in response to community needs.

Make every effort to make evening and weekend rotations fair and equitable while affording consideration to circumstances or information provided by staff.

Once a schedule is posted a part-time staff member is able to accept shifts at other locations. When employees have accepted a shift at another branch, that shift is their top priority.

Refer to these best practices when scheduling to achieve a more uniform outcome across the system.

2. Best Practices: (👉 denotes a best practice)

Online Scheduler

All service points use the web scheduler for creating schedules and part-time payroll. The weekly schedule as found on-line is the official version of the weekly schedule.

👉 Use the online scheduler to improve scheduling efficiencies and to provide better access to scheduling information for all staff.

👉 Staff are responsible for regularly checking their schedule on-line. After posting the schedules, any changes to a staff member's schedule should be confirmed with them.

Schedulers

Branch scheduling is the collaborative work of the Manager, Assistant Manager/Circulation Supervisor and/or Library Assistants, as assigned.

All staff schedules include shifts of varied hours with evening and weekend shifts. Evening and weekend shifts are assigned as needed to meet the requirements of the service point.

↳ Schedulers will make every effort to make these rotations fair and equitable considering all factors and information available.

Scheduling requests, changes, trades, inquiries, suggestions, concerns, etc., should be emailed to all staff responsible for scheduling, rather than to the individual schedulers. This will facilitate communication, ensuring all schedulers receive the information they need to incorporate the necessary changes into the schedules, and makes provisions for a scheduler going on vacation or being otherwise absent. (Within this approach, it is recognized that there are times when a staff member may wish to limit communication of scheduling request information to the Manager, in the interests of confidentiality around sensitive personal matters.)

↳ To ensure consistent communications a group email address for the branch schedulers and the branch manager should be set up.

Scheduling requests

Although last-minute scheduling changes are sometimes unavoidable, whenever possible personal activities need to be planned well in advance and scheduling requests submitted **before** the weekly schedules are posted. Making frequent scheduling requests **after** the daily and weekly schedules have been posted makes a considerable amount of work for the schedulers.

If the schedule is posted and a shift change is required, try to find someone with whom to trade shifts and assume assigned duties **before** approaching your scheduler. Keep the shift change to the same staff level and the same number of hours. Special considerations will be made for emergent situations through conversation and discussion with the Assistant Manager or Manager.

For medical/dental appointments, the scheduling staff requires notification by email about the appointment, specifying the times of departure and anticipated return to the workplace.

↳ Staff are strongly encouraged to create solutions for shift changes they request, reducing scheduler's time needed and lessening the impact on other employees.

↳ All scheduling information is given in confidence and is not shared with other staff.

Notification of Changes

A staff member must be notified of any shift changes to his/her posted weekly schedule subject to their availability.

↳ When changing shifts after schedules are posted, ask the staff involved if they are available first, and then follow up with a confirmation of the change.

↳ Post unfilled or open hours on one line of the weekly schedule. Move hours to appropriate line when they are claimed.

Payroll	Name	Hrs	Sunday Jan 30	Monday Jan 31	Tuesday Feb 01	Wednesday Feb 02	Thursday Feb 03	Friday Feb 04	Saturday Feb 05
825033	OPEN HOURS	35		10-3	1-5	9-1	9-5		

Accommodating Staff Preferences and Needs

Please notify the Scheduling Team via email of any preferences you may have. The Scheduling Team will take these preferences into consideration when scheduling; however, operational needs may prevent expressed preferences from being accommodated at all times. For various reasons, a staff member may have short-term or long-term preferences such as: which day(s) he/she has a day off for working a Saturday and/or Sunday; not working a specific evening; or specific times for lunch breaks.

↳ All staff will endeavor to communicate directly with the Assistant Manager regarding time needed to satisfactorily complete assigned duties and program preparation if not enough time is provided on the schedule.

Length of Breaks

For 7 hours scheduled 30 (or 2 X 15) minutes paid break and 1 hour unpaid break
 For 6.5 hours scheduled 30 (or 2 X 15) minutes paid break*
 For 6 hours scheduled 30 (or 2 X 15) minutes paid break*
 For 5 hours scheduled 30 (or 2 X 15) minutes paid break*
 For 4 hours scheduled 20 minutes paid break
 For 3.5 hours scheduled 15 minutes paid break
 For less than 3.5 hours no break

**An optional unpaid break of up to one hour to be arranged between the staff member and schedule/Manager*

Additional Issues Impacting Schedulers' Decisions

- Staff desire for input/considerations in schedule creation
- Providing sufficient staff of the appropriate levels for customer service desks, circulation services, programs and outreach
- Providing sufficient staff for evening and weekend shifts
- Staff requests for schedule adjustments
- Union contracts or government rules for mandatory rest times or overtime
- Budget considerations to avoid over- or under-staffing
- Shift and rotation patterns, i.e. varying shift lengths (3 through 7 hours).
- Work schedules may involve a variety of shift hours (i.e. 10-6, 1-9, 6-9) as determined by the requirements of the branch while remaining within budget guidelines
- Weekend and night commitments of staff
- Accommodation of student schedules and courses
- Vacation requests
- Internal courses, training, and meetings

3. Roles and Expectations in Scheduling

Public Services Leadership Team

- Co-ordinate an annual meeting of in-branch schedulers, Assistant Managers and Managers to exchange ideas and best practices

Managers/Associate Managers

- Annual or regular check-in (e.g. survey/dialogue) with individual staff regarding any scheduling consideration (e.g. courses, family responsibilities, etc.)
- Ensure schedules are posted and amended according to timelines established in the Collective Agreement
- Strive to provide consecutive days for rest as outlined in the Collective Agreement
- Ensure customer service and operational needs are met as the primary driver of schedules; within that framework, exercise consideration to supporting staff in leading balanced lives
- Ensure a fair allocation of evening and weekend shifts (including statutory holiday weekends)
- Direct the work of the in-branch scheduler
- Ensure that scheduling reflects health and safety standards
- Openly and transparently communicate scheduling practice, consideration and challenges
- Approve vacation requests
- Define vacation allowances that the branch can accommodate
- Provide training and support for Assistant Manager and/or in-branch scheduler
- Facilitate and approve reasonable requests for shift trades
- Coordinate inter-branch scheduling solutions where appropriate

Assistant Managers/Membership Services Supervisors/Materials & Operations Supervisors

- Responsible for the creation and posting of the long-range (i.e. weekly) schedules and, in some cases, daily schedules
- Create equitable schedules within guidelines and expectations established by the Manager/Associate Manager
- Meet the timelines established in the Collective Agreement
- Refer complex scheduling requests to the Manager/Associate Manager

In-Branch Schedulers

- Responsible, in some service points, for creation and posting of the daily schedules
- Create equitable daily schedules within guidelines and expectations established by the Assistant Manager/Membership Services Supervisor/ Materials & Operations Supervisors
- Refer complex scheduling requests to the Assistant Manager/Membership Services Supervisor/Materials & Operations Supervisor

Staff Members

- Communicate openly and promptly with manager and scheduler about emergent situations to facilitate scheduling solutions
- Submit scheduling requests in a timely manner prior to posting of schedules
- Provide advance notice of meetings, appointments, etc.
- Submit vacation request as per the Collective Agreement
- Verify the accuracy of the hours on their own timesheets

4. Special Considerations Regarding Extra Shifts

Edmonton Public Library has a philosophy of “one library, one staff, one collection.” One of the benefits of this philosophy is the ability for part time employees to pick up extra shifts at other locations. Staff do have some responsibilities to consider before accepting these shifts.

Employees' Considerations

- Our workweek is 35 hours and shift length is a maximum of 7 hours. Make sure you have enough open hours available.
- Do not accept hours until your home location has posted your hours for the week in question.
- Once you commit to a shift, work it. It is almost impossible to fill these shifts at the last moment.
- Verify that your shift length, payroll number, and home location are correct on the time sheet.

Managers' Considerations

- Staff require 1 day of rest per week, following the Alberta Employment Standards Code.