

## Section Eight: Changing Schedules, Part II: Employer-Driven Solutions

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From the smallest family-run business to the largest global company, shift scheduling is often one of the most complicated aspects of business operations. There are many things that must be taken into consideration, including the needs of the business, the customer, and the employee, as well as other factors that are unique to each operation. How an employer tackles scheduling can affect all aspects of the business, to the point of making or breaking it.

Although thoughtful workforce policies and regulations can set important baselines for fair practices, and technology can certainly aid in the creation and implementation of effective scheduling systems, scalable solutions also spring from employers' innovative and empathetic philosophies towards their workers. A collaborative approach to setting systems and practices, open communication between employer and employee, mutual respect, and a sense for workers of significant and valued participation in their companies' ultimate success all can have positive impacts on both a business's bottom line and employees' job satisfaction and general well-being.

In this section, *Invested* talks with six employers of varying sizes and business models—from a large, global retailer to a small craft brewery and restaurant—who have proactively developed and implemented scheduling practices intended to benefit both their businesses and their employees.

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**Lara Shock** is the senior director of Associate Choice Initiatives at Walmart, where **Sean Thurman** is director of global public policy. Walmart is a large retailer with over 4,000 store locations throughout the United States. This interview was conducted on September 13, 2017, and has been lightly edited. Most questions were answered by Shock; in cases where both Thurman and Shock responded, their names are noted.

*Business size: 2 million employees globally; 1.5 million in the United States*

*Employee roles: vary widely from in-store hourly associates to management*

*Full-time/part-time/seasonal employees: mix of full-time and part-time, some seasonal/temporary*

*Schedule format: electronic program*

*Schedule posted: three weeks ahead for in-store associates*

Q: How does the company handle scheduling for this many people? Is there a system that you use?

A: We feel our customer is number one, and that philosophy essentially drives the way we schedule our associates. We generate schedules in a way that ensures we're ready for the customer—so shelves are stocked, items are available, the bread is made, and so on and so forth. That may take the form of a cashier at the register and an associate available in our service areas, so essentially our associates tell us when they're available to work, and we then assign a shift within that criteria based on our customer and work demand. We do have a system in place currently, but we're working to replace it right now as part of our scheduling pilot that's under way.

Q: If an employee needs to change their schedule last minute, how does that work?

A: How our schedules are posted drives the path that the associate would go down for changes like that. The associates in our store can see their schedule for the current week plus the next two weeks; that's what we consider a posted schedule. If a schedule has already been posted and the associate can't report for a scheduled shift, they would do one of two things. If they know well in advance—so let's say you're in the current week and they know something has come up and they can't make their shift the next week—they could have a conversation with their manager to discuss options, and usually we find a way to get that shift covered so that there's not a gap for our customer. But if it's last minute—for example, I can't make a shift that I'm scheduled for tomorrow—that associate would essentially have to call out. The likelihood of that shift being filled is probably pretty low, because we don't operate in an on-call environment, and we are very respectful of the fact that we don't look to disrupt schedules that have already been posted for associates. As we look to the future, though, I think it's important to note that we're working to make it easier for our associates within each store to manage those types of schedule changes through capabilities like shift swap, through which I could try, within my associate population within the store, to fill that shift on my own without manager intervention. That's the future that we're working toward.

Q: What are your considerations when you're thinking about how to plan employee shifts, both your considerations at the company level but also those of a store manager more locally? What are they thinking about in terms of making sure everything's covered?

A: They're thinking about a lot, especially in our supercenters, because it's a big business to manage. Really, when you boil it all down, we're essentially considering what work do we need to have done and what are our customers' demands going to be. For the first part, the work that we need to have done, it's what modulars do I need to set from a merchandising perspective in the coming weeks. From a customer perspective, as a store manager I'm generally going to be in tune with the pay cycles in my community, and so I know maybe that I'm going to have big business maybe on the first and the 15th of the month, and I need to plan staffing for that. We also obviously use a lot of big data here from and for each store to understand the traffic patterns, what's selling, how fast it's selling, frequency, things like that. Any seasonal events that are coming up, obviously we've got our finger on the pulse of that as well. So there's a lot to consider.

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Q: With the regulatory or legislative changes around scheduling that may be taking place, particularly on the state or local level, how are you thinking about trying to accommodate that if you need to, especially with so many locations in different states, cities, and towns?

Shock: I think the impact to the business would really vary based on the requirement. For example, let's talk about a requirement for providing associates' schedules a certain number of days in advance. If that fits within our current practice, which is to provide the current week plus the next two weeks, the impact may be low overall, right? But I would worry about the impact on our associates' ability to practice choice, and by that I mean that I would hope that if we had that requirement, our associates would still have the option to swap a shift or pick up an additional shift on their own and not be bound by that advanced-notice requirement. In the end, businesses will have to comply, and of course we would fall in line with that, but I actually tend to worry about the adverse effects of those decisions. To me, and I guess to all of us in the retail business or in any business, the devil's really in the details, so we'd really have to look at it on a case-by-case basis. I think we need to consider what the unintended consequences to the actual employee might be, and the impact on the business, of course, on our need to meet our financial obligations, as well. There's always an impact; I think it just depends on what the requirement is and who it actually impacts.

Thurman: I think that reflects a lot of employers' feelings about the kind of proposals that we've seen. The details do matter. In addition to what Lara touched on, I think the issue that we risk running into with the types of scheduling mandates that we've seen is that you could then find a policy environment that also sort of perpetuates a compliance environment among employers, in which they're changing their systems and practices purely for compliance, as opposed to taking proactive steps to try to deliver new and innovative processes and systems that meet the needs of employees and customers. In the future, for example, we might not be able to take the time to explore some of the pilot options that we're looking at. So we're certainly at the front edge of this, and we're listening to what our associates' needs are, and we want make sure we can really balance that with the needs of the business.

I think that policymakers can certainly have a role here. Workforce agencies at all levels of government are reaching out to employers like us, and we're very happy to be part of those discussions, sharing our best practices and what other employers could potentially do. And I also think it's important to go after truly problematic practices, things like on-call scheduling. That obviously is something that we don't do, and it is something that's very disruptive to the concept of stability, which is what we're ultimately trying to achieve here for our associates. So I think the details do matter, and I think we worry about these requirements becoming a little too rigid and making it difficult to make positive changes for employees.

Q: So are individual requirements like those being enacted in San Francisco and Oregon a challenge for you because you're trying to create scheduling practices for the whole company? How would you tackle that?

A: I think for us, any time you have to configure a system that's different than the main, it can create challenges. From the perspective of what we're trying to accomplish for our associates and, I hope, to help drive the retail industry in general to do something different, again the thing that I worry about is that ultimately those associates may not be able to take advantage of the full opportunity. So that is what keeps me up at night. We can configure the system, though maybe it won't be as optimal, and maybe the cost of doing

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business will be higher as a result or maybe it won't. But at the end of the day, to me it's really about the associates' experience and the offer and commitment that we're making to them, and I would be concerned about what they might not get to opt into because someone else has made a decision for them.

Q: Walmart is in the midst of a scheduling pilot called Associate Choice Initiatives. Why did the company decide to do this, and what problems were you trying to solve with the new program?

A: We had some recognition around scheduling that came in a lot of different forms in a short amount of time. We recognized first and foremost that our workforce, our customers, and retail in general are all just evolving so much and so quickly. Our customers' and our associates' needs are changing, so the way that we serve them—in the store for our customers and in the schedule for our associates—must follow. We think about it in terms of the associate, the business, and the customer—the “ABCs.” We knew that we needed to simplify the scheduling process and bring new scheduling technology to bear to enable our managers to make better decisions and to free them up to serve our customers and train our associates. Quite frankly, we hadn't invested in new workforce management or scheduling technology in quite a long time, so it's just a bit antiquated.

We also knew we had to provide our associates with more transparency into the way we schedule, and we had to offer scheduling options that would better meet their needs. So we listened to our associates and our managers, because they are the front line, and they understood why associates may be leaving us for other jobs. Associates' scheduling needs look vastly different depending on their lives because we have such a diverse population, and some of our associates are looking for flexibility while others are looking for consistency. How do you provide a schedule offer that meets both needs?

And then finally, we knew that we had to ensure that our schedule would enable us to deliver the level of service that our customers deserve, and in a lot of ways that means bringing a schedule to life in the store that creates a seamless transition between digital and physical—online and in-store shopping—and we had to deliver that through a different way of thinking about schedules. That might mean having an associate who's available to serve a customer that's standing right there in the store at the front end, or making sure that the items are available on the shelf, or having an associate available to pick an order that was placed online—all of that has to be brought to life in the form of a schedule, in the form of people that can meet that demand. So from an associate, business, and customer perspective, that's really what we're looking to accomplish through the pilot. We are piloting a variety of scheduling options that range from consistent schedules to “gigs,” which are on-demand shifts.

Q: How are you updating your scheduling technology as part of this pilot?

A: What we were using previously had just reached its shelf life, and we were looking for a scheduling technology that would present a lot of information to our managers in a very easy way: visual, intuitive, and mobile, so they can tour the store looking at coverage plans on their mobile device. We were also looking for technology that would translate for our associates—put the power in the palm of their hand, essentially, to be able to deliver the capabilities and the functionality that we envisioned for them and that they told us would excite them. Finally, we wanted to make sure that the technology would put the customer at the center of

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everything. We wanted to let our managers take their hands off of scheduling to some extent, because they were spending a lot of time on it where we could instead bring a lot of data to bear and present them with a starting point. We wanted to let them truly see what the demand was so they could make good decisions for both their associates and their customers, and at the end of the day meet those financial obligations that we as a business have to consider.

Q: Was there a specific geography or a type of store that you were piloting in for this?

A: Yes, we started as we typically do with our neighborhood markets, which are our smaller stores. They're typically the test case for us as an organization in many things we pilot, but we were intentional about the areas in which we piloted. We've got over 4,000 stores that operate in 50 states and varying complexities from a geography perspective, so in any test or pilot that we undertake, we always want to make sure that we're not just testing it in the easiest store to run. So, for example, we tested it across the board from a complex to a more average operating environment.

We are in a small number of supercenters now with the pilot, about 72 supercenters in total. And again, those are in a couple of different areas across the country as we look to go into markets that will enable us to test a good sample set, from low volume to high volume and urban to rural and lots of other things. We are looking to expand to more supercenters at the end of this year and early next year, and then hopefully from there we can move a bit quicker as we look at the next fiscal year.

Q: When you were putting together the pilot, did you speak with associates? How did you get their input, what kind of input did they provide, and how did that help you?

A: Yeah, absolutely. We frequently rely on our associates to help us develop and refine new programs. We gather their feedback, and that's both before we run the test and in an ongoing way. It takes many forms, honestly, from listening sessions in the stores, to surveys, to blogs, to informal conversations during in-store visits. The associates are always very candid, which I love: they tell us what they like, what they don't like, what's understood versus what they don't understand, all in the spirit of continuous improvement because we view them truly as partners in our business, and we hold their feedback in high regard.

Q: How are you assessing the pilot, and what kind of indicators are you monitoring?

A: Within Walmart, we have a few analytics teams, and we monitor these things very closely, as we should. There is a long list of success criteria that we've placed against this. At a very high level, I can tell you again that the customer is at the center of that, but of course we are also very focused on associate and manager satisfaction and schedule effectiveness, because we are truly transforming the way we think about how we manage our workforce. So for example, we want to know if we were able to get the work done while we met the customer, associate, and financial obligations that we have and make an impact on turnover.

Q: Have you seen any change in how your customers experience the store in the places where you've instituted the pilot?

A: Yeah, we are starting to see that, both in the actual metrics, but I think more importantly anecdotally. I was just in a store yesterday that has been on the program for quite some time and is now moving into a new phase of the program, and it was really exciting to hear from our associates and customers from that schedule consistency perspective. From the customer's eyes, they're seeing the same associate, say in deli, who knows exactly what meat they want and how they want it cut. I had a cashier tell me that she has really gotten acquainted with her customers that are coming through the front end, to the extent that she knows there's one customer who comes through every Monday morning and likes her items to be double bagged. Having the same associate in the same place at the same time, when that works for them and meets the business's and the customer's needs as well, is really an amazing thing when you start to see those personal relationships that are developed and those stress levels internally and externally that have come down.

Q: What kind of feedback have you been hearing from the associates themselves about how they like the new program?

A: In general, we've had really positive feedback. As they start to get acquainted with the program—what we're intending to accomplish, how we bring that to life for them, and the options that they have—we see excitement and a lot of engagement. But I'm not going to sit here and tell you that it's all rainbows and unicorns, because this is a big change for us, and it's a big change for some of our associates. The environment that we're operating in is just so different than it was three or four, much less 10, years ago. How and when the customer shops with us is changing, and that means that how we schedule has to change as well, and that's not easy for everyone. I will tell you that we have associates who have been impacted by a schedule change, and we have to spend a lot of time, as we should, helping them understand why we're changing and the options available to them. So, I think we've seen a really positive response in the main, but definitely it's not easy for some associates and managers to adopt it initially.

Q: What do you think is most challenging about developing and implementing a system like this, especially for a company so large?

A: Honestly, I think one of the biggest and most challenging things about developing this program in particular is that it's more than just scheduling. It's more than just a new system. We really had to take a step back and change the way we thought about how we developed our budgets, how we thought about productivity in our stores, and how we could consider the unique attributes and service offerings of each store, down to the type of flooring in each store, how long it takes to clean it, and who needs to clean it. That is incredibly challenging because it requires buy-in from most of the teams here at the home office, from merchandising to finance to central operations, and that's before you even think about introducing something new to a store. So I think just being mindful about the level of change that this is requiring across the organization and the impact—that has been truly the most challenging, just getting everybody to understand why we need to change and to build that path. If you had talked to me two-and-a-half years ago, I would've told you that we would've had this done by now, and that our associates would be swapping shifts and that we would have delivered that consistency and flexibility based on their needs. But what we learned through the pilot approach has caused us to think differently about the groundwork that we need to lay to do this right and well. It takes more time than we expected.

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Q: Are there things you've learned from running this pilot and scaling it up that you think other companies might be able to use, especially large companies that are trying to address these problems?

Shock: Yeah, I think so. First and foremost, we've learned to just really listen to our associates, customers, and managers, because if you look to develop a scheduling process or practice that doesn't consider the needs of those groups, I don't see how you can be successful. I think it's important to realize that you have to "go slow to go fast," because we know that we can certainly be disruptive in a bad way if we aren't very methodical about that path we take. And then lastly, I would say just don't underestimate the change management that's potentially required at all levels within the organization, from your senior leadership to that cashier in the store in Texas. There is some level of change required by everyone, from what we've found, and you can't underestimate the time and energy that you need to wrap around that to do this the right way.

Thurman: Right. I would just impress on you all the time and effort that goes into getting something like this right. We're talking about a policy environment where we're largely aligned with a lot of the things that we've seen, and so we certainly hope that this window into what we're trying to do shows that it's a very important effort, but it takes a long time. It takes a lot of commitment, and we're certainly committed to getting it right.

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*"When we talk about a lower turnover rate, why people stay, it isn't always just the money—it's the environment. Do you feel like it's a family business, and do you feel like you're being treated fairly? And I think that's in our corner."*

**Ronn Garry Jr.** is the president and owner of Tropical Foods, a supermarket in Roxbury, Massachusetts. This interview was conducted on August 28, 2017, and has been lightly edited.

*Business size: 95 employees*

*Employee roles: cashiers, baggers, grocery, produce, meat, administrative, receiving, and maintenance*

*Full-time/part-time/seasonal employees: about two-thirds full-time and one-third part-time*

*Schedule format: Excel spreadsheet*

*Schedule posted: upon hiring (hours remain largely consistent, so no need to repost)*

Q: Your business is a typical supermarket, but a little bit different, right?

A: It is. We consider ourselves a conventional supermarket. A lot of people try to say that we're a specialty supermarket, but we aren't really. For our clientele, we're just a supermarket; it just so happens that a lot of our customers are from other countries.

Q: Do you employ younger workers, adults with families, or a mix?

A: It's a definite mix. We've had people who have been here for over 30 years, and we've had several generations of employees—you know, where the father is hired, and then we've hired the children. The newer employees tend to be younger because when you come in, it's usually an entry-level job until you can work

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your way up and stay. I'd say that compared to most supermarkets, our employee base is probably a little bit older than most.

Q: And what is the typical rate of turnover among your employees?

A: On the cashiers and baggers, the turnover is pretty constant, so I'd say we're hiring one to three people a week, but it's a 30-person department. In the other departments, it might be one a month. And some people stay, like I said, over 30 years.

Q: And what is a typical shift? Are there ever late, early, or swing shifts?

A: We have to cover all the hours the store is open, so we start as early as 6:00 in the morning and we have crews that go all the way to midnight. We try to keep people working consistent hours—so if you're going to do a morning shift, you're going to work the mornings, generally speaking, and if you're going to do a night shift, you're going to work nights. We try not to create a situation where someone is in at 6:00 a.m. one day and then 5:00 p.m. the next day. We do not have any on-call shifts.

Q: How do you all typically schedule your shifts?

A: Because it doesn't change a lot, we really don't need anything fancy. I know a lot of people are trying to get every last penny or nickel out of the schedule, but we're trying to get more consistency than that—consistency from our managers but also from our employees too, as far as the hours—so we don't think we need anything that projects out the budgets. We're trying to get more of a straight line. I'd say 98% of the time you're going to know your schedule well in advance. They're basically permanent schedules.

There are people who are flexible and maybe have another job, so you might have a situation where somebody works, say, 30 hours a week, and the holidays are coming up or it's a busier time of the month and then we may ask them if they want to pick up more hours. So you'll offer more hours, but you have your sort of base schedule.

Q: If somebody is sick or they have an emergency, how do you usually have them notify you?

A: We ask them to call at least a day in advance, but I'd say about half the time that doesn't happen. You usually get the call as the shift is starting. The way we handle it is that we'll look to see who's not scheduled for that day and we'll call them. It's not mandatory, so they don't have to come in, but it's voluntary if they want to pick up a shift. Or you may ask people if they are able to stay for an extended shift, but again, that's not mandatory; it's something that we do frequently to cover open shifts and give people the opportunity to pick up hours if they want them.

Q: If that happens frequently enough, that people can't come in or cancel last minute and you have to shuffle the schedule around, what would you say is the impact on your business or your management?

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A: Yeah, that's when you have to talk to the employee, if you have someone who's chronically mixing up the shifts. The schedule is kind of like a spider web—you know, you pull one piece of it and it reverberates all the way across the whole web—and that's sort of how it is with us. If somebody's consistently not making their shift, then we have to have a conversation and say, look, this isn't fair to your coworkers or anyone else. You hope that it's something that can be resolved by just changing the schedules or adjusting the hours, but if somebody just can't follow their schedule, then you need to walk it down the line.

Q: What are your considerations when you plan shifts, beyond your employees' availability?

A: We're trying to be fully staffed at the peak hours, and our biggest thing is to make sure that the customers get in and out as quickly as possible, and we want to have people available so that we can do that. So if someone were to call in that has a morning shift, that's probably not as big of a deal because it's not as busy of a time in the store, but if somebody's calling at 5:00 p.m., that's a big deal.

Q: What do you think are the greatest challenges around managing a staff of this size and doing scheduling for that many people?

A: When you have a hundred people, it's a hundred different personalities; things come up in their lives and they would love to have a given day off. But the hard thing on entry-level jobs is that people don't quite understand that you're supposed to come into this job, work the hours, get a good recommendation and move on to the next job, and sort of build your way up that way. Not everybody sees it that way right away, so I think that's a definite challenge, setting and following up on expectations. The challenges to maintaining a consistent schedule are benefits and healthcare. We've been able to offer healthcare for our full-time employees and still offer a consistent schedule, but as the cost of that goes up, it is becoming a huge issue.

Q: When we spoke earlier, you mentioned that you thought it was odd that most employers don't institute consistent schedules. Why do you say that?

A: For us, there's such a benefit in terms of training costs, consistency, and being able to have the right expectations of employees. I've found that it's hard to keep a part-time person, because usually this is their second job, so it's usually the first one to go, the one that's least valued. If you have a lot of part-timers and you're constantly putting a new person in place, you're constantly going through the training, and you're constantly straining your business, both for your customers and your existing employees. It's a very stressful situation when there's so much turnover. So I've always thought, boy, there's a cost there that I don't know if businesses are really appreciating, and maybe it's worth the extra couple of hours to have a full-time person or to be able to pay some of the health insurance for an employee to get that kind of consistency. Now, of course, everybody has to run their business the way they see fit, but it just seems to me that less stressful is better.

Q: If you had to comply with something like a minimum number of hours per week, or not having on-call shifts, or things like that where certain practices are mandated, how do you think that would impact your business and would that be workable for you?

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A: I've read that they want to have the practice be that you've got to tell the employee a week in advance, and that seems fair to me—that's what we do. We don't do on-call. I'm not sure about the minimum hours, because there are some people that only want 10 or 15 hours, so I don't know how you manage that. But I do think that the consistency of schedule is important for employees' lives. You need to know when you can schedule your doctor's appointment; you need to know when you have a day off. I think that's really important for the business and the employee.

Q: Do you hear any feedback from your employees about that, maybe here versus some of their previous jobs?

A: Absolutely. My managers tell me that when they talk to the employees about it, they hear that it doesn't happen everywhere else that they can know their days off in advance. When we talk about a lower turnover rate, why people stay, it isn't always just the money—it's the environment. Do you feel like it's a family business, and do you feel like you're being treated fairly? And I think that that's in our corner.

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*“The staggered shifts came about because we realized a number of years ago that parents who always dropped off their kids early and picked them up early would very rarely get to see some of the staff who were there later, and vice versa. So this way, the parents get to know all of the teachers in the classroom.”*

**Mathew Dolan** is the executive director of the Arlington Children's Center, a childcare and after-school program facility for children who are toddlers through school age in Arlington, Massachusetts. This interview was conducted on September 19, 2017, and has been lightly edited.

*Business size: about 58 employees*

*Employee roles: teachers, float teachers, classroom assistants, administration*

*Full-time/part-time/seasonal employees: about half full-time (benefits eligible) and half part-time*

*Schedule format: on-site calendar*

*Schedule posted: at the beginning of the school year and adjusted as needed from there*

Q: What is the typical length of employment for teachers and assistants? Do employees stay with you for a while or is there a lot of turnover?

A: It varies wildly and it's different for the adult staff versus the teenagers who work with us as classroom assistants. For the adult staff—all of our teachers—the typical length of stay is about six years, though we do have a number of people who've been here 15 years plus. As far as the high-school students go, there's a lot of turnover. We know when we hire them that the employment's going to be temporary—three months, four months, or five months, and that's typically tied to a sporting activity or some other extracurricular activity that the student knows they're going to be involved with. We know when we hire a bunch of kids in the fall that three kids are going to leave and play basketball in the winter, but at that point soccer will be over, and I

have some kids who worked for us last spring and summer who are soccer players, so they'll come back on board. So among the teenagers, there's quite a bit of turnover, but that's a known factor.

Q: Is there a typical shift by role, and do you ever have late shifts or on-call shifts, anything like that?

A: We don't do on-call. The full-time teachers work eight-hour days, but their shifts within their workweek can change. Typically, if a classroom has four teachers, there are four different shifts. Each employee in that classroom would cover one of those four shifts Monday through Thursday, and then on Friday they would rotate their shifts. So if there's a 7:30, an 8:00, a 9:00, and a 10:00 a.m. shift—those are beginning times, all eight hours—each person would cover one of those, and then on Friday they would rotate. The staggered shifts came about because we realized a number of years ago that parents who always dropped off their kids early and picked them up early would very rarely get to see some of the staff who were there later, and vice versa. So this way, the parents get to know all of the teachers in the classroom.

We also employ float staff. Many of them are part-time, so they either come in for a four-hour shift in the morning or a four-hour shift in the afternoon. Our full-time floats—they're not really on call because they're scheduled, but their hours may vary depending on the shift that they're covering, so they could be in as early as 8:00 a.m. or they could come in as late as 10:00 a.m. and work their eight hours either way.

Q: Are the float staff guaranteed a certain number of hours?

A: Yes, they are. If they're hired to be full-time at 40 hours, then they would get 40 hours a week, and if they're hired part-time at 25, they're going to get their 25 hours.

Q: Is this typical for your industry? Do you think teachers in jobs like this are used to rotating through different shifts like they do at your center?

A: It's one model that's used. I think what's more common in many programs is that each teacher works a consistent shift—so if someone's a 7:30 a.m. shift person, they come in at 7:30 every day; if someone's an 8:00 person, they come in at 8:00 every day. We used to do it that way and then, like I said, it wasn't a great way to get to know the parents. The other thing is that the earlier shifts tend to be coveted— people want to come in early and leave early—so the 7:30 and 8:00 shifts tend to be more desirable than the 9:00 or the 10:00. So in many schools, no, they don't do it our way, but I can tell you that I'm on the board of another school, and they looked to us and said, "Well, how did you implement that? How did you go to the staggered shifts or the changing shifts?" We had to do it over time, and they've now since done the same thing, for the same reason, really—for the two reasons of getting to know the parents, and being fairer to the employees and not having those coveted earlier shifts always go to the same people.

Q: How do you typically schedule shifts?

A: We use a calendar in the office. My colleague Johanna manages the day-to-day scheduling challenges that come up when you're in a childcare center with people being out sick, and also the pre-planned vacation time and things like that. At the beginning of each school year, the teaching teams in each classroom work with Jo

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to come up with the basic schedule for the week—who's going to do which shift each week, and are they in fact going to rotate on Fridays. The schedule is determined in the fall and then it sometimes needs to be adjusted as the fall goes on; if we see a higher population later in the day or earlier in the morning, that might mean that a shift has to get changed to accommodate that population of kids. But if the schedule changes, it's not going to change by more than 15 minutes to a half an hour per shift, and we try to keep those schedules pretty consistent. Something could come up—if a teacher starts taking an afternoon class on their late day, for example, they may switch shifts with another teacher so that that can be accommodated.

Q: When you plan out schedules in September and as you adjust them going through, what are your main considerations?

A: Well, everything's really dictated, as it has to be, by regulations, so there are state-mandated ratios which have to be met. But like other childcare programs that I'd like to think of as high quality, we far exceed the ratios that are set by the state, which also gives us flexibility. So sometimes, if the classroom teacher's out, with the remaining regularly scheduled teachers the ratios can still be met. But almost everything we do is dictated by regulations, whether it's scheduling or water temperature or all the other things we have to follow—that's primary. Beyond that, again, the teachers work within a team to figure out what works best for them as a group in terms of what shifts they're going to do on which day.

Q: What do you think is the most challenging thing about developing schedules like this and adjusting them as you go?

A: The biggest challenge I think we face is, in fact, when there are four or five people who call in sick and you already have three people on vacation. Developing the schedules isn't all that challenging—the staff within the classroom pretty much do it on their own, so if there's four people in the classroom, they literally sit down and talk about which day they want to have early, what would work best for them, and they present it to administration. We can take a look at it and see that they're covering what they need to cover. Sometimes Johanna will go and see what the number of children present is at a given time of day because sometimes we may not need three staff in by 9:00, if in fact there are only 12 kids present in that classroom—and we know we can then adjust that shift to a bit later. But the challenges come at those times when people are already on vacation and then there's some outbreak of a stomach bug or the flu and you end up with a ton of people out in one day.

Q: When you interview people to potentially hire them, do you ask about their availability and tell them about your scheduling model?

A: Yes, absolutely. When we are vetting people for jobs, we definitely talk with them about the way that we do scheduling, especially for those preschool positions, because many times they are coming from a school where they might have worked the same shift every day, and that's not how we approach it. So, yeah, we definitely make that clear during the process.

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Q: Do the people who are hired as float teachers want to work in that way? I'm curious who those employees are and how they come to work that way as opposed to a "regular" teacher who's a staff teacher for the classroom.

A: Sometimes float teachers are new graduates or people looking for a change. For some people, being a float comes with fewer responsibilities, so they don't have to participate in parent-teacher conferences and they don't have to participate in staff meetings on a regular basis. They're not interacting with parents in quite the same way as classroom teachers, although they do still interact with parents. But there's a lot less paperwork to do, and that's really appealing to some people. We have a gentleman who's a full-time float, and we offered him a classroom position a couple of years ago, but he opted to stay a float. He likes working with the different age groups—you can be working with little ones as young as two or you can be working with the after-school kids, who go up to grade five. I floated for half my days quite a while ago, and I really liked it because every day was different. I got to know so many kids and their parents as well. So it's appealing to some people. We even have one woman who's been a float for 20 years. It's not for everybody, though, because some people would rather have that consistent time with the same children and the same parents; you establish different relationships that way. But for the people who want to do it, yeah, it's a great job.

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*"The program came about when we realized, hey, we've got really good guys working for us and we don't want to risk losing them, so what can we do to keep them happy and keep them with the company through the winter?"*

**Marcy Brownell** is the operations manager at Windows and Doors by Brownell, a sales and installation company in Williston, Vermont. This interview was conducted on September 7, 2017, and has been lightly edited.

*Business size: 50 employees*

*Employee roles: sales, installation techs, shipping and receiving, delivery, marketing, administration*

*Full-time/part-time/seasonal employees: full-time (with seasonal adjustments)*

*Schedule format: board in the office with job schedule listed (for installation)*

*Schedule posted: 12 weeks in advance, with adjustments (for installation)*

Q: Given the constraints on your work in the winter months in Vermont and New Hampshire, how do you adjust your workers' schedules seasonally to deal with the weather and the cold?

A: For the 15 individuals in our company who are installation techs, we have what we call a winter program, which runs approximately from January 1 to March 15, or for 12 weeks. During that winter program, we guarantee those installation employees that for six of those 12 weeks we will have work for them. It could be two days one week and three days another week, but in total we guarantee 30 days, eight hours a day, at your full regular wage. But since we can't control the weather, there could be 30 of those days where you're going to be at home—so during those essentially on-call days, we pay them 40 percent of their regular hourly wage, or a minimum of \$8.00 an hour, and basically they are paid to stay at home. Now, some people also choose to

get side work during that season—and we’re totally fine with that—so they are essentially getting \$8.00 an hour from us and then they are also maybe working for their aunt and uncle sheet-rocking their basement during the winter. But there are always people who don’t have side work, and they say, “Hey, I’ll take it. I want to work for Windows and Doors by Brownell.”

We’ve been doing this program for at least five or six years, and no one really has an issue with the schedule. If they want to take a week’s vacation, we are fine with that, and they get paid their 40 percent winter program salary to be in Florida. We also give them the option to trade paid time off (PTO) that they’ve earned for an additional \$5.00 an hour. For example, say they make \$20.00 an hour—the additional \$5.00 an hour would be a quarter of a PTO hour. So for an eight-hour day during the winter program, if they wanted to take that \$5.00 in addition to their \$8.00 an hour, they ultimately get paid \$13.00 an hour to be at home and on call, and that is only going to cost them two PTO hours per day. So there are some guys that love using their PTO hours to go hunting or something like that, but there are also guys that don’t take a lot of vacation, so they always supplement their 40 percent salary with this additional \$5.00 an hour PTO.

Q: That sounds pretty unusual. Why did your company decide to put this winter program in place?

A: Winters are so unpredictable that it was impossible to say for certain, “We’ll have work,” or “We won’t have work,” or “You can take this week off and work this week,” because all of a sudden it’s 10 degrees below zero and we can’t work, even if that was the week we had scheduled for a job. So this gave us more flexibility with the employees.

But the owner was also very concerned about losing employees, which makes perfect sense. From our perspective—and this is our philosophy—if you put employees in this situation on unemployment for the season, it’s not necessarily costing us anything at that moment, although obviously anybody who’s really thinking about it, your unemployment rate can go up, so that can really cost you in the long run. But you also run the risk that you’re going to lose a valuable employee who you’ve already trained, who knows your system, and who you can turn to—all important reasons why you wouldn’t want to lose them as an employee. If you lay them off in the winter, there’s no guarantee they’re going to come back because they might find another job that for whatever reason had work during the winter, and some people aren’t going to keep jumping ship back and forth.

So the program came about when we realized, hey, we’ve got really good guys working for us and we don’t want to risk losing them, so what can we do to keep them happy and keep them with the company through the winter? They’re still full-time employees getting their benefits and their paid time off, but they just essentially get paid to be at home. And, quite frankly, a lot of the guys love it because, if you think about it, even if they didn’t work for those 12 winter weeks and they just were at home getting their 40 percent, in the summer they’re working 45 to 50 hours a week, so at the end of the year, they’re still getting paid full-time wages. So for their personal budgets, they’re definitely making a regular annual salary, just on slightly different timing. And because of those longer hours in the summer, they kind of like the break during the winter. So it’s really been received well.

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Q: Did most of these employees take you up on this program when you instituted it? What was the response at first?

A: The response initially was like anything that's new: people were like, "Whoa, what's going on with this?" The first year was probably the hardest because we didn't really decide to do it until the fall, so they didn't really have a lot of time to plan for it at first, but then people started acclimating to it. Now any new employee hired as an install tech is told right off the bat about how the winter program works, so they fully know what to expect, and whether or not they elect to budget for it, they have the option. I think the first year was kind of tough because everyone runs their personal budgets and finances a little differently, so they perhaps didn't plan on not working and getting full-time wages. But at the end of the day, I think they also appreciated not being laid off, because even if they had no intention of leaving our company, you could argue there's a stigma with being on unemployment. Whereas with our program, they can spin it: we get time off during the winter because we work so hard during the summer. So I think, quite frankly, that helps the ego a little.

Q: So regardless of the season, if someone calls in sick or has to call out for a day, how do you usually deal with it?

A: I'd say the only time it becomes an issue is if a delivery driver calls in sick. If an installation tech calls in sick, it's unfortunate because they were planned for something, but there were already other guys that were going to be on that job—so, yes, we're less efficient and maybe the job runs a little later, but it's not really the end of the world for us. It's inconvenient, but it's not terrible. But when it comes to the delivery drivers, obviously that becomes a hindrance if they have a run scheduled and they have a truck that's loaded and they're out sick. We're very lucky, though, because we've created skill diversity among people, so if need be, one of our install techs can be a delivery driver. We would just pull him from install that day and he'd jump in the truck. That diversity costs us money up front because you have to train people to do more than one job, but our belief is that in the end, we're better off because of that ability to fill a role when needed.

Q: How do you line up installation jobs and how do you schedule them?

A: We have four full-time guys who go to people's homes to give them estimates for the job, and then we have inside coordinators who are in charge of the schedule. We have a board that has all 15 guys' names on it; we estimate how long each job's going to take; and we plan about 12 weeks in advance what each job's going to be and who's going to go. That's very loose, because you could have a week that slows everything down, but we always build plenty of empty days into the schedule so that we can account for a job running longer or running into a lot of rain. That also helps us keep the customers' expectations on board.

Q: Would you say that the guys who work on the install jobs are typically used to this kind of job-by-job schedule?

A: Yeah, definitely, though it is different than somebody who works at a construction company in some ways. If you're with a construction company that's working a job at a college, for example, you're at that job for anywhere from two to 12 months or even longer. Our jobs can be one-day jobs. Or sometimes we're just going to somebody's house and changing out their door onto their patio deck—that's a two-guy, one-day job. But

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they're very used to going to different places, and they could be on anywhere from one to five jobs in a given week.

Q: If a job gets called off last minute or something changes and the install tech is not out on site doing a job, does he have something else he can do that day? Does he still get paid for that day?

A: Yep, absolutely. For instance, this week it has been especially rainy up here, so the guys have been in the shop priming trim boards or running some trim, because we stock all of our trim and all of our materials in our shop. There are always times when, obviously, we wished it hadn't rained because we wanted to be out making revenue, but at the end of the day this other stuff has to get done too. The only time we ever would call off and say no one's working today is if it's in the winter and they're part of the winter program. Otherwise, they come to work and we find stuff for them to do; we never send them home during the summertime, and they always get paid.

Q: What do you think is the greatest challenge of scheduling and staffing the installation jobs?

A: The greatest challenge is the number of homeowners we deal with. In one week we could be working with 10 to 15 different homeowners, so it's just that constant contact with them and making sure their expectations are met. If the homeowner says, "Well, my daughter doesn't get up until 9:30 in the morning, so can you start at 9:30?" We have to tell them, "No, we have to be there at 7:30 because that's when the guys work." So I think, quite frankly, homeowners make the scheduling much more difficult, but our employees do not make scheduling difficult at all. They show up on time and there's never a question of that, and I think that's part of why we take some of the approaches that we do with the winter program, because we don't want to lose them. I mean, they know what it costs us if somebody doesn't show up for the day—so perhaps you could argue that we're paying more up front during the winter when we're not making as much revenue as we do during the rest of the year, but it pays us back in the end to have those reliable good carpenters for the rest of the year.

Q: So having the winter program actually ends up costing you less money as a business over time?

A: I think so. And it's changed our mindset because even if it's a good, sunny working day, if it's 30 degrees outside, the guys aren't going to be as efficient as they are when it's 50 degrees. So sometimes we find that when we push to get the job done, we're paying them for full-time hours, but it's taking them 20 percent more time to complete it—whereas if you just wait until the next week when it's going to be nicer, you'll get the job done faster and you'll be paying for fewer hours. Each scenario's totally different when you've got so many jobs, so it's hard to really quantify that, but I think our gut feeling is that this actually allows us to make more money in the long run with the amount of guys that we have.

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*“We’ve found that what shifts you work and have available to you is really an expectation about money and about life-work balance, and those expectations have to be as clear as possible for the success of both the business and the employees. So that’s something that we’re really adamant about.”*

**David Boynton** is the co-owner and co-founder of 7<sup>th</sup> Settlement Brewery, a craft brewery, farm-to-table restaurant, and catering company in Dover, New Hampshire. This interview was conducted on September 18, 2017, and has been lightly edited.

*Business size: 45 employees*

*Employee roles: brewers, servers and front-of-house staff, kitchen staff, managers, administration*

*Full-time/part-time/seasonal employees: mostly full-time, some part-time*

*Schedule format: online program that employees can access*

*Schedule posted: two weeks in advance*

Q: Are there typical shifts that people work in your business?

A: We try to be as consistent as possible. People tell us their availability and their preferred shift, and we take all of that into account as best we can. We’re also always trying to move the kitchen staff to four-day workweeks—four longer days. We get more efficiency out of it, but they also get three days off, which is kind of unheard of in the kitchen world. We have people who go hiking and climbing, and we really try to support a life-work balance. For example, one of my bartenders is about to summit Mount Katahdin after hiking the Appalachian Trail for six months, and he knows he’s welcome to come back after that for any shifts we have available. We can’t promise jobs like that, but we can support your work-life balance. We’re happy to support you in whatever way it takes to make that happen.

Q: How do you plan your employees’ schedules and what are you taking into account as you do that?

A: We use an online program, so it’s easy and accessible for the staff and it’s also easy for them to give up shifts and have those shift trades approved. There’s more accountability, and that’s not about trusting them to get their shift covered—it actually makes expectations clearer. And we’ve found that what shifts you work and have available to you is really an expectation about money and about life-work balance, and those expectations have to be as clear as possible for the success of both the business and the employees. So that’s something that we’re really adamant about.

It’s about capacity and willingness too. For example, if we had a server that needed more hours but we didn’t have more serving hours available that week, maybe we have some host hours or bar-back hours available to that server instead. It’s about doing the best that we can to help all of our employees get their ideal schedule. This time of year, as well, some full-time employees go down to part-time because school gets overwhelming for them, and then part-timers might move up to full-time, so it’s kind of always moving.

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Q: How often do you update the shift schedule?

A: We do scheduling every week, but for two weeks out—and that’s kind of been the sweet spot. We want to give our employees enough time to make plans, but if we give it too much time, there would be so many switches of shifts that it wouldn’t really be an effective schedule anyway. It’s less management to do it this way, and it actually better meets everybody’s expectations—that’s what we’ve found.

Q: You’ve just started to institute a “hospitality included” model at 7<sup>th</sup> Settlement. What is that and how does it work?

A: The hospitality-included model eliminates tips for front-of-house staff. This is a model that New York restaurateur Danny Meyer pioneered in the U.S. a couple of years ago. When I learned about the ugly history of tipping, I realized that there are side effects of tipping that are not beneficial to anyone. And the customer is not responsible for the employee’s wages in any other industry, really, other than hospitality, so it’s a very strange thing. When you look at it, I think that eliminating the tipping culture and reorienting around a hospitality-included model benefits all. The hard part is educating employees and guests. While I would never tell other restaurants that this is what you have to do, as a restaurant, we have to realize that we *do* tell our guests all the time about our expectations in different ways. When you price your menu, when you plan your menu, when you design your seating and lighting, you’re telling guests what to expect when they come to your place. And you’re in charge of their experience, so it’s almost a responsibility more than it is a privilege to make these changes in the way our staff is compensated—and this just happens to be one way we believe we can make a positive change in our community and in our business itself.

With hospitality included, for the guest, the menu item prices do go up between 15 and 21 percent. But we’ve done an example of a check on the front of our menu to show customers that the overall check price doesn’t go up if they were going to tip a standard tip percentage anyway. That was an important thing to convey to the guests. What surprised me was how incredibly worried people were about my staff and that they weren’t going to make the same amount of money. They just don’t understand the financial side of it. I was able to promise my staff that we’re going to switch to this new model and no one’s going to go down in pay—you’re probably going to make the same if not a little bit more. So the front-of-house staff is just being paid differently with the revenue share, but they’re not getting paid more as a percentage of their revenue in our company as they were in their tips.

We feel that by instituting this program, we’re creating an environment and an experience for our guests that is less awkward, more fulfilling, and more relationship-based with our staff and our community. And because we’re offering things like earned time off and health benefits now to our full-time employees, it becomes more attractive to our employees to work full-time. So now we will have more full-time employees who stay with us for longer periods, which creates efficiencies in training and output of our service, and then that creates better guest retention and new guest attraction. Under this model, when the business does better, everyone does better.

Q: What impact do you expect the new model might have on your employees’ schedules?

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A: Already it has very little impact on their actual schedule, unless they want it to. Because of the higher hourly wage with the revenue share, it is actually easier to take some slower shifts if you need to for family reasons or another scheduling issue in your personal life. But the point is, how can we take the money off the table? If you went to get a job in another industry and you said, this is how much I need to make per year doing a job that I enjoy, you could negotiate to make that your salary. Why isn't that feasible in this industry? Why can't we just say, this is how much you're going to get paid, these are the expectations of the job, these are the resources that the ownership and management teams are going to give you to make that job happen, and we're going to work together to grow the business so you can get a raise and so we can be one of the best places to work?

Q: One of the things we've heard from other service-oriented businesses is that they sometimes will let people go early if service gets slow, because staff don't want to wait around and earn their tipped wage if they're not getting tips. So is that what you mean when you say they might pick up some slower shifts because they can afford that if the wage is higher?

A: Yeah. But when it comes down to it, you get paid really well here, but we have higher expectations too. If it's slow or you have time, you're going to be cleaning more or doing more side work. It's a job, so we expect you to come and work hard, but it pays off. We really manage expectations around what we can give employees who are closing the restaurant at the end of the day versus those that are opening it, so that that becomes fairer, as much as possible. But it's more about what's coming from the employee, so they can understand, "Sweet-talking a guest isn't what is paying me. Contributing to an organization that creates the best experience it can for my community is what's paying me—and what is my role in that?" When you change that mindset, you change to a better, more consistent, well-rounded employee.

Now, I would say that I am fortunate that through good hiring practices and just culture development, we already had people in place who understood that. It's just that the culture of tipping didn't allow for it to blossom. So now that we've changed that culture around tipping, our employees are starting to go beyond just this single mindset of "how do I earn more tips?" and little ideas start to come out about how we can create a better and more community-oriented restaurant experience. For example, how can we get flowers on the table from a local gardener?

Q: For you, what do you think is the greatest challenge about putting together, managing, and adjusting a schedule for as many people in as many different roles as you have?

A: I think the greatest challenge is that the industry itself is inconsistent. We will have a weekend where we need all hands on deck, but you can't say no to the person who needs the day off because their brother's getting married and they're in the wedding. One of our main concerns is to make sure that our staff is always conveying their needs and wants around scheduling and that we also convey our expectations. I think as long as the communication is clear and the expectations are on the table, we'll come into far less conflict.

We're also trying to do open-book management. It's a little bit hard logistically, but I'm open to it. When you get people on open-book management, they understand the costs in the business. They understand that if you don't waste cleaning supplies in the kitchen sink or you use fewer trash bags, you can have an impact on your

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pay. It's much more direct and visceral and people really understand that mindset. It's about being more transparent with your employees, coming to the table with them and saying, these are the outcomes that we want, so what would work best and how do you all want to do it? Let's figure out what works best for everyone to grow the organization and become more resilient. As long as we all hold up the vision and the mission and the outcome that we want, the best approach, I think, is to rely on the staff and give them a say in how we get there as a team.

*“I believe that manufacturing is losing ground because it's not keeping up with the business models that are successful in this day and age. People are not getting the flexibility they need, and they're not getting the support systems they need as families.”*

**Emily Hall Warren** is the director of administration at the W.S. Badger Company, a manufacturer of natural and organic body care products in Gilsum, New Hampshire. This interview was conducted on September 26, 2017, and has been lightly edited.

*Business size: just under 100 employees*

*Employee roles: manufacturing, fulfillment, sales, marketing, customer service, finance, administration*

*Full-time/part-time/seasonal employees: mostly full-time, some part-time, some variable hour*

*Schedule format: electronic for variable-hour employees (consistent hours for most others)*

*Schedule posted: weekly for variable-hour employees, published Friday for the following week*

Q: Do you have part-time, temporary, or seasonal workers at your company?

A: We do have some employees who are working part-time who choose to do so because they're in retirement, so this is in addition to their social security income. We also have a group of variable-hour employees who work an average guaranteed number of hours throughout the year, though their specific schedule changes on a week-to-week basis based on our business needs. They are part of our operations team, meaning that they either work in fulfillment—our shipping department—or in our production department. The creation of that sort of structure of employment was a direct response to the fact that our business is really seasonal—our number one selling product is sunscreen, so the busy season starts in April or May and goes through July or August. For most of our 20 years in business, we had quite a few seasonal employees that would work three to five months out of the year, and then after the season was over their employment would end. It had a big effect on our business to onboard, train, and have all these people join our community and then have them leave. So just recently we've switched to this variable-hour employee model with the hope that it's going to reduce our need for seasonal workers.

Q: Do you see regular turnover, or do people stay with the company for a long time?

A: We have very low turnover, I would say about two percent annually. That's exceptionally low for a manufacturing company. Our tenure for employees is not that long—our average tenure is just a little over

five years—but I would credit that to the fact that we’re growing so quickly that we’re hiring a lot of new people, so the folks who come on board stay.

Q: How often do you provide new schedules to the variable-hour employees?

A: We publish the schedule on Friday for the following week, but I would say that it’s not like other manufacturing companies where I’ve worked because our employees tell us the days they’re available to work. So they have lots of flexibility and input into the schedule, and because we understand that people have limitations, we work around their schedule while making sure we have the staff needed for any given day.

Q: Are some of them also working a second job, or do they have other commitments outside of work that they’re working around?

A: People often come to work for Badger as part of a lifestyle choice, so they are choosing to work here because of our alternative model of business and our family-friendly policies. Many of our employees have varied and passionate interests outside of work—we have homesteaders, yoga teachers, artists and folks working in the community arts world—so for many people being here provides them income that supports their passions outside of work. And as much as we can, we try to incorporate their passions *into* our work. For example, we have people who are teaching yoga on site, we have a gym on site, and we have a gallery that showcases employee photos, paintings, and other forms of artistic expression.

Q: Can you tell us about Badger’s family-friendly workplace policies and the kind of flexible-scheduling options you offer people around that?

A: It’s a passion and part of our mission to create a working environment (particularly a manufacturing environment) that is family friendly. We believe the number-one thing businesses can do to be family friendly is to provide flexibility, which means that if an employee needs to leave to watch their child’s school play, they should be able to do so. Or, if a child’s school pick-up time is at 3:00 p.m., we can adjust the schedule to accommodate that. It also means that parents don’t have to feel stressed about taking time off to stay at home with a sick child. Universally across every department employees are treated as part of the team. Team leaders and staff know what needs to happen to get the work done and how to support that, but within that model, employees are treated as a whole person with a home life where work also needs to get done. We want to ensure all employees enjoy a work-life balance.

Q: Was that policy based on talking to employees in addition to the philosophy you have as a company?

A: Our workplace policies have been part of our business model from the beginning. Bill Whyte and Katie Schwerin founded the company, but they were also parents, so creating a business that respects its employees and incorporates family-friendly policies was second nature. As we’ve grown, we’ve had to renegotiate some of those policies to accommodate a larger, more diverse workforce. Twenty years ago, if the day turned hot and uncomfortable, it wasn’t unusual to see folks leaving to go for a swim in the nearby Ashuelot River. Today, Badger is big enough that we can’t support that kind of impromptu activity anymore without notice or planning, but for the most part, there’s very little that we’re not able to accommodate.

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Q: Are there certain roles where if someone is out, you would need to replace them for the needs of the business for that day or that shift?

A: Well, we do have this pool of variable employees that we can call in when we need to, and manufacturing is the department where that would be most likely to happen. However, we've found that when you treat people with respect and transparency, they're more engaged. So, for the most part, when we say, "You know what needs to get done," if anything people are going to step up more readily than they would otherwise because they know that on the flip side when they need to take time off, they can.

Q: Do you think that these company policies around flexibility have influenced how long people stay with you and how they feel about working for the company?

A: One hundred percent, I believe that's true. Our recruitment costs are close to zero. People seek out Badger, and once they join the team, they stay because of our approach to business. We have quite a robust package of benefits that support families, including childcare, camp reimbursements, and our babies-at-work program. A recently conducted employee engagement survey showed that 100 percent of respondents felt their managers cared about them as an individual, and 88 percent self-reported as being highly engaged in the workplace.

Q: Can you tell us a bit about your policies around childcare and scheduling?

A: Family and children have always been a focus for the company. As a former teacher and now a business owner, Katie Schwerin has a unique perspective in that she sees the need for companies to support the children of employees as well as women in the workplace (46 percent of our management team are women at this point, by the way). So we have a very comprehensive benefits package in place to support children and parents, starting from the time babies are born. We have paid family leave for the primary and secondary caregiver, and when a parent comes back to work, we have a babies-at-work program, where they can choose to bring their infant to work from ages three months to about six months. We also don't expect that while caring for their new baby, a parent will come back to work full-time, but we like to give them options, and we love having the babies around. Once a child turns six months, Badger parents can choose to enroll their baby in our childcare center located about a mile down the road. Badger heavily subsidizes the program, asking parents to pay only a small tuition. Children can attend the center from six months until three years of age. For those older than three years, Badger offers parents a camp reimbursement subsidy. We recognize that there can be up to 11 weeks during the year when a school-aged child doesn't have quality care through their school system, and we want parents to be able to afford to make good choices for who's watching their children while they're not in school. We also formally say that anyone who wants to adjust their schedule to meet a school schedule can do that.

Q: On the flip side, are there any challenges from a business standpoint if you have folks who are working on these different schedules? How do you manage any conflicts between those employee needs and the business needs?

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A: Yes, there can be conflicts. I would say the biggest challenge is that businesses tend to streamline things to work automatically and smoothly without necessarily putting a lot of thought into them, and that's more of a lean in approach: set up a system that works and then refine it. What you gain is ease, from a management perspective, but what you lose is how you're going to accommodate any individual need or situation. Everyone is forced to bend and conform to this ease-of-use schedule. So I would say that at Badger, we ask more of our managers than most businesses when it comes to people skills, understanding the needs of individual employees, and being accommodating and flexible regarding schedules, whether that's a week, two months, or six months out. We also ask our managers to spend time thinking about the needs of their team so that each person feels supported to bring their whole self to work. Things don't just run automatically, but the outcome that we get is so unique and beneficial to our business that it far outweighs any difficulty that it takes to get there. I spoke a bit about how happy people are to be here, how they feel valued as individuals. We have happy, healthy families in this environment and a really strong community network of support here at Badger which has enabled us to become an employer of choice in the region. Most of all, everyone in our company gets to go to work at a place where they want to be every day, and you can't really ask for anything better than that.

Q: So it seems that it's particularly unusual for a manufacturer to set up this kind of system. Do you think it's something that could be transferable to other companies, obviously with some changes here and there, but something that could work for other manufacturers?

A: These programs may seem unachievable for other businesses. However, several are relatively easy to implement, cost little to nothing, and can have a significant impact on employee recruitment, retention, and engagement. For example, offering a flexible work schedule, operating transparently, providing a babies-at-work program, engaging employees and treating them as individuals, and offering an annual wellness fund. It will become imperative that manufacturers adopt innovative family-friendly benefits if they want to remain competitive in attracting and retaining a skilled and engaged workforce. Millennials want to work for businesses that are making a difference in the world. They want to feel positive about what they're doing and the way they're being treated. I believe that manufacturing is losing ground because it's not keeping up with the business models that are successful in this day and age. People are not getting the flexibility they need, and they're not getting the support systems they need as families.

Q: Some states and cities have started to put forward some scheduling legislation around things like ensuring a minimum number of hours for employees or ensuring they get their schedule a certain amount of time in advance. Would that be very difficult to comply with?

A: Not at all. We would be happy to comply and would like to see other businesses doing so too. Badger wants to be a model for doing business in the way that we believe should be happening in the rest of the world.

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