

Section Nine: Concluding Thoughts and Recommendations

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In this issue of *Invested*, the first in our four-part series on employment in New England, we considered the role that work schedules play in overall job quality and business sustainability. As is evident from the interviews in this issue, schedules factor heavily in the stability and success of both workers and businesses, but creating a fair, transparent, and workable schedule that meets the needs of the business can be a difficult task given all the considerations and obstacles that come into play. The challenge is most significant for those in the service, healthcare, and skilled-trade sectors, where variable hourly shifts are the norm or workloads may change over the course of the week or the year.

A fair and predictable schedule is an essential component of a quality job. Workers need to have a reliable sense of when, where, and how often they will be working in order to schedule other aspects of their lives. Knowing how many hours they can expect to work each week also allows employees to plan ahead financially. Some advocates argue that even a higher hourly wage won't improve conditions for workers on its own if they can't reliably secure a minimum number of hours each week or shift schedules that they can actually manage with the other responsibilities in their lives.

Predictable schedules also matter for businesses, in part because labor is often one of the most significant operating costs for employers. When a company's scheduling practices truly work, employers reap the benefits of lower turnover, reduced training time and expense, and reliable, pleasant employees who are well-rested and ready to serve customers during their shifts—a business advantage especially in a strong economy in which employers compete for talented workers. Some employers have adopted employee-centered scheduling as a core component of their business philosophy, while for others brand impact may be a key consideration.

The insights in the preceding interviews make evident how important and yet difficult it can be to develop and stick to a predictable schedule. What a “good” schedule looks like varies considerably across industries, business locations, and employee roles. Some employees need a dependable and minimally-changing work schedule to meet their families' needs, while others are open to or even excited about schedules that change frequently, allow for longer stretches of time off, or may mean more hours and more pay in a given week. Some businesses see consistent demand and traffic year-round, while others face the challenge of balancing a busy high season with a low- or no-revenue off-season. Businesses may grapple with changes in customer demand or unexpected economic hurdles while employees struggle to accommodate the demands of second jobs, school, or household emergencies. All of these factors directly impact what schedules look like, how often they can be updated, and how frequently they might change at the last minute.

During our conversations with businesses, workers, and researchers for this issue of *Invested*, we quickly learned that there really is no one-size-fits-all solution to scheduling. That reality can make it especially difficult for policymakers to sort out and effectively respond to truly irresponsible scheduling practices that

take advantage of employees. Last-minute schedule delivery may be a predatory and preventable practice in some workplaces, for example, while for others, it might be impossible to accurately provide a three-week schedule in advance. Still, it is important for policy to establish and enforce basic fair scheduling practices that protect employees from abuses in the workplace.

It may therefore make more sense for businesses to proactively demonstrate how fairer schedules that meet the needs of their particular business and employees are workable in real-world, on-the-ground situations, and how they might be replicated elsewhere. But for some businesses, particularly those with a larger workforce, even a great scheduling idea may prove too difficult to implement without the help of technology. As we have seen, developers of new programs and applications, particularly those using a smartphone platform, are stepping in to help employers and workers establish schedules that function within the constraints of their particular workplace, enable quick and easy communication between management and staff, and adapt to and comply with new rules or regulations that may arise.

The bottom line is that building a better schedule takes time and consideration and, especially, ongoing conversation between employees and employers. It is a crucial process that when taken on with care and concern for everyone's best interests can positively impact workers' lives, businesses' brands, and communities' success. We have learned a great deal from our discussions with our interviewees about how to approach better scheduling and offer the following recommendations based on those conversations.

Know the difference between flexibility and unpredictability. Flexibility in work schedules encompasses a wide range of features such as working remotely, working longer-day four-day workweeks, and being able to pick up additional shifts if you want them or swap shifts you can't cover with a coworker. These scheduling options allow employees to work when they are most productive and give them options when emergencies arise in their lives, and also ensure for an employer that shifts will be covered. Flexible options also give workers some ownership of their own schedules and make them feel that their employers recognize and care that they have lives and responsibilities outside of work, which in turn helps employees feel invested in their workplace.

Unpredictability, by contrast, is more of a one-sided situation. Schedules that are unpredictable often have to do with trying to maximize the bottom line of a business at the expense of employees' stability and well-being. Unpredictable schedules may include elements such as last-minute mandatory changes, having to work shorter or longer shifts without notice or proper compensation, and penalties for employees who are unable to work a given shift due to an emergency or cover someone else's shift at the last minute. In terms of schedule fairness and quality, the key differences between flexibility and unpredictability are how much input and control workers have over their own schedules, and to what degree employers invite their employees into the process.

Consider the cascade effects of unpredictability. The last-minute changes inherent in unpredictable schedules may affect not only the worker herself, but many others as well. If a worker relies on a family member for

childcare, for instance, that family member's schedule is also affected if the worker has to go to work or stay late at work without notice. If a worker has a second job, last-minute changes at the first job impact the schedule at the second job when the worker cannot arrive for her shift because she is still on the clock at the first job. It is important to realize and build schedules around the fact that very few workers' lives are not directly connected to the lives and schedules of others who depend on them and on whom they depend.

Businesses with an off-season require different and sometimes creative solutions. New England includes many regions where tourists flock at certain times of year but business is slow during the opposite seasons, and many areas where winter weather can prevent work from being done, particularly for outdoor jobs. As discussed in several interviews in this issue, businesses in these areas may struggle to hold onto workers over an off-season, to fully staff their operations in the high season, and to get work done on time in bad weather. To staff up for the busy season, businesses may need to rely on temporary workers or student workers in order to prevent burnout from overwork among their permanent staff members. During winter seasons when operations scale back in these areas, employers might be able to shift workers from seasonal sites to indoor, permanent locations so those employees can still get some hours in and be paid. Businesses in the trades and other industries where work is impacted by winter weather can develop off-season programs where workers are essentially on-call or manning other responsibilities at the business if they are unable to do their usual work outside, so that those workers stay with the business and are still able to manage their personal expenses through the winter. All of these strategies require employers to go the extra mile to retain valuable employees, but the payoffs for doing so may come through in lower training and turnover costs and employees who stay with the business because they feel their employer cares about their ability to stay afloat during the slower seasons.

Policy informed by workers and employers can help to lift up best practices and wipe out bad ones. In this discussion about fairer schedules, policy plays an essential role in raising the floor by establishing basic fair scheduling practices that apply equally to a full range of businesses to prevent mistreatment of employees. Still, even the best intentioned policies around scheduling can make it difficult for some employers to manage schedules in ways they have already developed that work for their businesses and their employees. It is important for policymakers to consult with a range of workers, business owners, and managers to most effectively frame their policy proposals to eliminate truly unpredictable scheduling practices while also lifting up flexible practices that work better for employee and employer. Understanding how these scheduling practices play out on the ground is essential to giving businesses enough flexibility to institute practices in their own workplaces that allow them to meet everyone's needs as uniformly as possible.

Leverage technology tailored to the changing demands of modern schedules. As several of our interviewees noted, scheduling technologies can either foster a more flexible environment or perpetuate a more unpredictable one, depending on how the programs are used. New programs and tools that bring workers into the scheduling process may help businesses create fair and flexible schedules that can still account for the unique needs or constraints of that business. They can also make it possible to free up managers' time for

other responsibilities if workers are empowered to swap shifts or take on additional shifts without needing to call individual people or secure multiple approvals. For larger businesses in particular, various metrics can also be tracked with some scheduling programs and incorporated into scheduling decisions to help reduce overscheduling during slower shifts and ensure businesses are properly staffed during busier hours.

Focus on communication. Both the workers and businesses that we spoke with for this issue emphasized that open communication is necessary to develop schedules that work for everyone. Workers need avenues to communicate with their managers or employers about scheduling problems, whether they are one-time concerns or consistent issues with regular shifts. In some cases, confidential avenues that ensure employees will not face retaliation for airing their concerns may be helpful. It is also important for workers to be notified of and understand the reason for changes employers may make to scheduling systems or policies. While it may be impossible to please everyone when making scheduling changes, reducing confusion and frustration by clearly explaining changes and accepting and acting on feedback wherever possible can help to reinforce a positive relationship between employees and their managers and bosses.

If the schedule cannot be made consistent, stabilizing related company policies and processes can help. For some businesses, variables such as client needs, scheduling of individual site-based jobs, and weather, among others, make it impossible to promise workers a consistent regular shift week in and week out. In these businesses, effective communication around scheduling and flexible responses to this variability can make a big difference. For example, workers might have the option to refuse a swing or on-call shift if they are able to find a colleague to cover it for them, which in turn is made easier by programs and systems like apps and email chains that connect employees with one another. Workers with fewer family or personal obligations outside of work might also volunteer to be included on a list an employer can keep to fill last-minute shifts quickly. Employers might be able to provide additional compensation, priority in future shift scheduling, or other benefits to employees who cover a shift or have to come in early or stay late on a given day. While workers in industries where variable schedules are more common might be accustomed to last-minute changes, options like these can help to prevent employee burnout, give workers the ability to tend to personal needs even if the schedule changes, and ensure for a manager or business owner that shifts will be reliably covered.

How much input employees have into their schedules makes a big difference. Nearly every interviewee we spoke with emphasized that the degree of involvement employees have in the scheduling process may be the most important element of creating a fair and workable schedule. Several of the innovative scheduling solutions shared in the preceding interviewees sprang from conversations between managers and employees, or by way of a tip or link an employee shared with the business owner. Meaningful involvement in the scheduling process and the ability to control to some degree when, where, and how often they work can make all the difference to employees, and has clear benefits for businesses that want to be employers of choice, offering quality jobs in their region in a tight labor market.

Keep an eye on emerging research. Researchers in the field are learning from their observations of and conversations with managers and others that perception does not always align with reality when it comes to scheduling, and are demonstrating that leveraging findings and data can help to better reflect and address the situation in the workplace. For example, as discussed in our interview with Susan Lambert in this issue, Lambert and her colleague Julia Henly discovered in [their studies](#) of large retail environments that there can be far less variation in demand than businesses may think. Understanding such emerging research findings might help businesses to be more comfortable adjusting their scheduling practices for the good of both the business and the staff.

Learn from businesses that are already experimenting with better scheduling practices and finding solutions.

As the conversations in this issue show, some employers already have practices in place that respect the scheduling needs and constraints of both the business and the staff, and others are beginning to experiment with solutions along these lines that might work for their particular businesses. The workplace is a crucial laboratory for practical and thoughtful experimentation with practices that can provide employees with a certain degree of work-life balance and income stability and reduce turnover and training costs and improve employee engagement and productivity for businesses, among other benefits. Rather than over-optimizing schedules at the expense of workers' well-being and financial stability, companies that are doing this forward-thinking work on the ground are demonstrating that there are productive solutions that lead to better outcomes for everyone. Their efforts should be encouraged as study around workplace scheduling and work on policy proposals continue, with each informing the other toward a shared goal of establishing the best possible practices for businesses, workers, and their larger communities.

We hope the insights in this issue of *Invested* will spark productive dialogues between employers and employees and among peer businesses about cooperative solutions to scheduling concerns, and that they will also help inform policy efforts to address these challenges. Please continue the conversation with us by sharing your feedback on this issue. We look forward to hearing from you.

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