



# **Innovative Scheduling Practices: A Resource Guide**

*Prepared through a joint effort of the  
Provincial Scheduling Working Group,  
Health Employers Association of British Columbia  
and British Columbia Nurses' Union*

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# INNOVATIVE SCHEDULING PRACTICES: A RESOURCE GUIDE

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## PURPOSE OF THE INNOVATIVE SCHEDULING RESOURCE GUIDE

**T**his Resource Guide is designed to assist Managers, Staff Nurses and Union representatives to explore the concept of innovative scheduling, to outline a process for implementing new schedules or changing existing schedules and to provide samples of potential standard and innovative schedules. **Nothing in this guide is intended to amend or to be used in the interpretation of the Provincial Collective Agreement.**

The primary data for the Resource Guide was developed in 2001 through a project funded by the B.C. Health Action Fund (Ministry of Health Planning, Nursing Directorate). The project was led by a Project Advisory Committee, consisting of representatives (Nursing, Human Resources and Union) from Children's and Women's Health Centre of B.C., the Vancouver Hospital and Health Sciences Center, Providence Health Care, the South Fraser Health Region and the British Columbia Nurses' Union (BCNU). The Health Employers Association of British Columbia (HEABC) joined the Project Advisory Committee at the initiation of Phase II in January 2003.

The project was divided into two phases. Phase I was to complete the background work, including:

- Review and summation of the literature, internet and industry practices.
- Development of a framework for identifying scheduling options.
- Identification of areas to seek specific feedback and conducting of focus groups.
- Summation of feedback from the focus groups.
- Compilation of themes and recommendations.

A summary of this information is contained in Section 2 and Appendices A, B and C of this Resource Guide, with the exception of a framework for identifying INNOVATIVE scheduling options that is contained in Section 3.<sup>1</sup>

Phase II of the project, which is part of an ongoing process, focuses on implementation of innovative schedules on a variety of units across a variety of sites, and builds in a structured evaluation at the completion of a six to twelve month trial period. A discussion of the process to develop, approve, implement and evaluate new schedules is contained in Section 4, with further details and samples of schedules provided in Appendices D, E and F.

The development of this Resource Guide, funded in 2002/03 by the Nursing Directorate, Ministry of Health Planning, is designed to build on work already underway in this area and to promote the use of innovative scheduling across the province. A teleconference introduced this Resource Guide to Managers, Union and Human Resources staff at 27 sites (118 people) throughout the province in March, 2003.

<sup>1</sup> These materials were developed during Phase 1 of this project, at which time HEABC was not a participant.



## **SECTION ONE**

# **INNOVATIVE SCHEDULING AND ITS IMPORTANCE IN NURSE RETENTION**

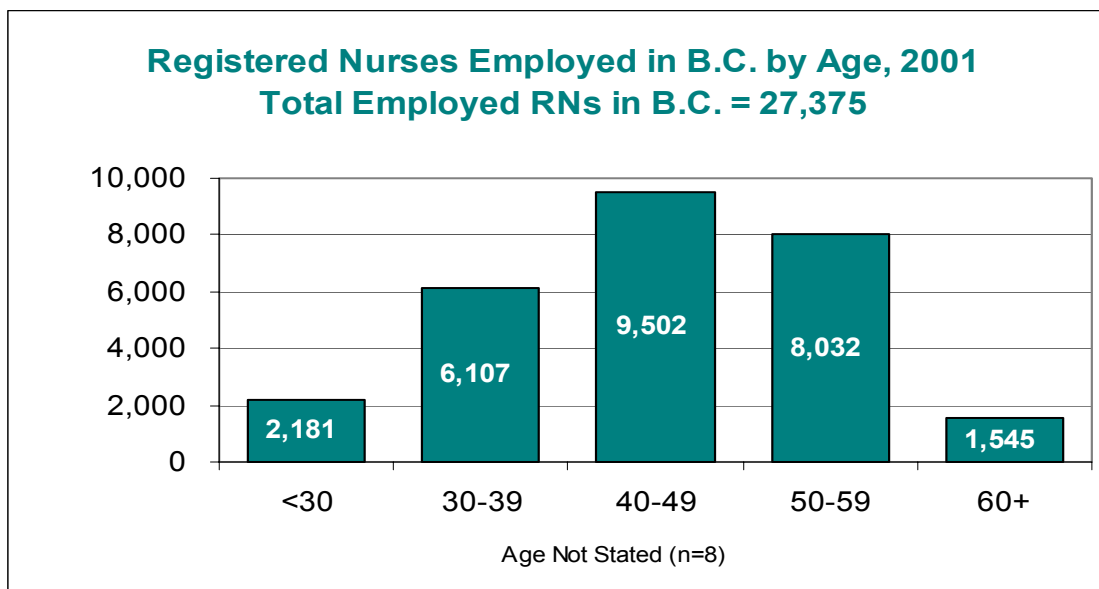


## INNOVATIVE SCHEDULING AND ITS IMPORTANCE IN NURSE RETENTION

The importance of a healthy work environment on nurses’ job satisfaction, retention, productivity and quality of patient/resident care has been extensively researched and is well documented in the literature. Establishment of such an environment is the result of many factors, including adequate staffing levels, providing appropriate forums for nurses to participate in decision making, recognizing and appreciating nursing expertise, support for ongoing professional education, visible and effective nursing leadership (especially at the unit level) and flexible and innovative shift scheduling.

*Innovative scheduling has been shown to positively impact staff recruitment and retention, and job satisfaction – all contributors to a healthy, sustainable nursing workforce. It can also impact on patients/residents care, as a result of more satisfied staff and a better distribution of work to match patient/resident schedules.*

The nurse of the 21<sup>st</sup> century crosses all generations including the new graduate, the nurse with a young family and the nurse preparing for retirement. Among the over 27,000 registered nurses employed in B.C. (2001), the average age is 44 years. Distribution of nurses within the various age groups is shown on the following chart:



Source: RNABC Web Site (with minor adaptations)

The emerging profile of nurse expectations around scheduling includes greater flexibility than in the past and an understanding that one size scheduling does not fit all.<sup>2</sup> Nurses need responsive, flexible and innovative schedules that allow a female-dominated workforce to balance home and working lives and to meet unpredictable family care needs.<sup>3</sup> Additionally, as nurses age, experienced nurses need to be supported to work part time, rather than transferring to casual or leaving hospital nursing.<sup>4</sup>

The employer of the 21<sup>st</sup> century is most commonly a large organization with a flattened hierarchical structure. These organizations are dealing with rising acuity, intensity and complexity of patient/resident care environments and an erosion of nursing leadership as a result of system downsizing in the 90's.<sup>5</sup> Front line managers have much larger areas of responsibility than ever before and may or may not have nursing backgrounds. While organizations acknowledge the importance of creating healthy work environments and supporting nurses as much as possible to meet their individual needs, the inherent challenges are also acknowledged. In placing the needs of patients/residents first, they find they may not always be able to meet the individual needs of nurses when working from a place of shortage, inadequate utilization of available nurses and insufficient funds to meet needs.

Far from being a burden, flexible or innovative scheduling, while being a satisfier for nurses of all ages, can also help nurse managers to fill shifts that have been historically difficult to fill.<sup>6</sup> Common to both employers and employees is the desire for a healthy work environment where patients/residents receive the best possible care. Fulfilling such a desire requires collaboration between managers and nurses to clearly identify important parameters around scheduling, to be committed to dealing with scheduling issues and to overcome obstacles in the process to the best of their abilities. It is important to keep in mind that flexible or innovative scheduling alone does not create a healthy work environment. Such flexibility and innovation needs to be coupled with addressing other concerns such as workload, nurse to patient ratios, nurse leadership, overtime issues, injuries, abuse, absenteeism, non-nursing duties and continuing education.

In conclusion, the need for innovative scheduling has increased significantly in recent years, primarily a result of a nursing shortage, an aging workforce, higher numbers of households with single or two working parents and an increased emphasis on balance between work and personal life. Despite the increase in need, little has been trialled and evaluated in the way of innovative scheduling within the context of the BC Health Care System. The 2001 Lower Mainland Innovative scheduling project and the development of the Innovative Scheduling Resource Guide are promising endeavors in moving this agenda forward in British Columbia.

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<sup>2</sup> Innovative Scheduling Practices, Phase One: A Multi-Agency Report, 2001 (unpublished).

<sup>3</sup> Canadian Nursing Advisory Committee (CNAC) Report, 2002; [http://www.hc-sc.gc.ca/english/for\\_you/nursing/cnac.htm](http://www.hc-sc.gc.ca/english/for_you/nursing/cnac.htm)

<sup>4</sup> Innovative Scheduling Practices, Phase One: A Multi-Agency Report, 2001 (unpublished).

<sup>5</sup> CNAC Report, 2002, [http://www.hc-sc.gc.ca/english/for\\_you/nursing/cnac.htm](http://www.hc-sc.gc.ca/english/for_you/nursing/cnac.htm)

<sup>6</sup> Managing a Multigenerational RN Workforce, Nursing Executive Centre.



## SECTION TWO

# LOWER MAINLAND INNOVATIVE SCHEDULING PROJECT

- Outline of the Lower Mainland Innovative Scheduling Project (Phases I & II)
- Summary of Literature/Internet Search & Industry Practices
- Summary of Focus Groups
- Themes and Recommendations
  - Scheduling Related
  - Broader Retention Related
- Summary



## LOWER MAINLAND INNOVATIVE SCHEDULING PROJECT

### Outline of the Project (Phases I & II)

#### *Background for the Project*

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Within the context of promoting a healthy work environment, the focus of the Lower Mainland Innovative Scheduling project (funded by the BC Health Action Plan) was on researching scheduling options and developing a variety of innovative alternatives to existing practices.

A two-phased project was established to promote flexible and innovative scheduling. The first phase, to complete the background work to identify potential innovative scheduling options has been completed. The second phase, to implement innovative pilot scheduling projects within participating health authorities, is currently underway.

#### *Process Used for the Project*

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The project consisted of several steps, which were as follows:

- **Review and summation of the literature, internet and industry practices**

With the assistance of a consulting team, the Project Advisory Committee searched the literature/internet and surveyed other organizations and industries both in Canada and the United States to identify key themes and innovative scheduling practices used elsewhere. Detailed results of the literature review, internet search and survey of other organizations are available in Appendices A, B and C.

- **Identification of areas to seek specific feedback and conducting of focus groups**

Using the information obtained from the literature/internet search and industry survey, the Project Advisory Group developed a list of questions for which feedback would be sought through conducting focus groups. Included in the focus group questions was the provision of feedback on seven potential scheduling options. These options ranged from establishing schedules for “difficult to fill” shifts through to self-scheduling.

The goal of the focus groups was to “test” the receptiveness of managers and practicing and non-practicing staff nurses to the proposed scheduling options. Through these discussions, it was anticipated that other alternatives may be developed.

- **Summation of Feedback from the Focus Groups**

With the exception of one question asking for feedback on specific scheduling options, feedback from the focus groups was consolidated and categorized as either scheduling or broader retention related (i.e., not directly related to scheduling) for each question.

For the question asking for feedback on specific scheduling options, feedback was consolidated and sorted into pros and cons of each option with respect to quality of worklife and safe patient/resident care. Participants were also asked to rate their level of interest in pursuing each option.

- **Compilation of Themes and Recommendations**

Using information obtained from the literature/internet search and industry contacts as well as feedback from the focus groups, the consulting team developed a list of overall themes and recommendations sorted into categories of (1) scheduling and (2) broader retention related and forwarded them to the Project Advisory Committee for consideration as completion of Phase I of the project. Phase II is ongoing and is intended to utilize these themes and recommendations in identifying, implementing and evaluating innovative pilot scheduling projects within participating health regions. Site sponsors (Nursing, Human Resource and Union contacts) are working to identify potential pilot projects and to provide ongoing support for implementation.

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## Summary of Literature/Internet Search & Industry Practices

In 2001, 16 articles and 10 web sites were reviewed and 22 organizations contacted (organizations both within and outside health care). Highlights and themes follow and a detailed summary of the outcome of the literature review, internet search and industry contacts are available in Appendices A, B and C.

Overall, the literature and internet review yielded disappointing results. There has been very little new material in the scheduling literature in recent years, other than to reiterate its importance to nursing retention. Most articles discuss scheduling at a high level but provide little in the way of specifics or new innovations. In cases where innovation is part of the culture, it is frequently for Monday to Friday type positions (e.g., telecommuting, nine day fortnights) and for positions whose work has less “immediacy” than staff nursing (mostly “desk” type positions). ***No other 24 hour operation has found a way to eliminate weekends or the night shift!***

Industry contacts provided similar information with few exceptions. In fact, many contacts outside health care commented that health care is more advanced than most industries in area of shift scheduling (likely due to a consistent supply of workers for the past several years in most of these other industries). Although scheduling was not identified as a priority issue in many of the 24/7 industries contacted, most acknowledged that their workforce was predominantly male, and the emphasis on scheduling would be less than it would be for a predominantly female workforce.

A summary of themes from the literature, internet search and industry contacts is as follows:

- Staff scheduling is one of many elements impacting on retention and recruitment of nurses and needs to be addressed in the larger context. Examples of other factors are found throughout the literature and include initiatives such as reduction of stress factors, providing educational opportunities, strong and innovative leadership, enhanced job design, involving staff in problem solving and decision making, creating a social community, care delivery systems, making the workplace a fun place and improving physical work environments.
- The need for flexible staffing has increased significantly in recent years, primarily a result of:
  - Increased numbers of households with single or two working parents.
  - Increased emphasis on a balance between work and personal life.
  - Increased emphasis on higher levels of education (requiring more flexibility in the workplace).
  - An aging workforce.
  - Scarcity of skilled workers.

- The goal in addressing scheduling issues is to create a win – win situation. The literature consistently outlined 3 principles:
  - Establish a mutual understanding between employers and employees about work priorities/needs and personal priorities/needs.
  - Recognize and support employees as whole people, including their roles outside the worksite.
  - Continually trial new ways to get work done, including looking for ways that enhance an organization’s performance (or improves patient/resident care) and allows employees to pursue personal goals.
  
- Flexible scheduling can have a positive impact on staff recruitment, retention, absenteeism, injury rates, morale, burnout, satisfaction and circadian rhythms. It can also impact positively on patients/residents, both as a result of more satisfied staff as well as distribution of work (e.g., patients/residents may not have to be awakened as early if staff begin later in the day).
  
- There is little new information written in the scheduling literature in recent years, other than a strong appreciation for its importance. Most of the literature discussed scheduling at a high level but provided little in the way of specifics or new innovations. In cases where innovation is part of the culture, it is frequently for Monday to Friday type positions and for positions whose work has less “immediacy” than staff nursing. Industry contacts provided similar information with a few exceptions. In fact, many industry contacts commented that health care is one of the industries farthest ahead in this area.
  
- Where flexible/innovative scheduling is in place, it is mainly a result of locally generated ideas, most often by staff. Many contacts stressed the importance of a need for commitment from both employers and employees. Some organizations have established joint employer/employee committees or processes for the purposes of promoting/approving flexible scheduling arrangements. The latter is outlined in the Saskatchewan and Ontario collective agreements.
  
- In developing staff schedules in a health care environment, a number of factors need to be considered including are:
  - Usual hours of care required by a patient/resident population throughout a 24 hour or one week period. These requirements may change as the patient/resident population changes.
  - Distribution of the hours of patient/resident care provided. The latter may “drive” the distribution/timing of workers or the distribution/timing of work; in the latter case, work may be distributed based on preferences or availability of staff.

Many variations of shift schedules are possible. These variations were categorized and are included in Section 3 of this report.

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## Summary of Focus Groups

Using the information obtained from the literature/internet search and industry survey and from brainstorming by the Project Advisory Committee, 14 focus groups (51 participants) were conducted between May 29<sup>th</sup> and October 5<sup>th</sup>, 2001 to ascertain what participants liked and disliked about their existing schedules, scheduling ideas (and others) to encourage nurses to work full time or to work past age 60, suggestions as to how to assist/support injured nurses to return to work, ways to support nurses to better manage home responsibilities and ways to increase nurses control over their work schedules. In addition, participants were asked for feedback on seven potentially feasible innovative scheduling options which were as follows: tours of difficult to fill shifts; innovative job sharing; innovative shift lengths and times; permanent shifts or consistent days off; flexible self-scheduling; periodic bidding on new schedules and permanent relief lines. Feedback was provided in terms of the impact of various scheduling options on patient/resident care (e.g., quality and continuity of care, availability of clinical and leadership supports and efficiency of care provision) and on the quality of worklife for nurses (e.g., team environment, child care, personal work schedules and commuting distance).

When participants were asked about what they liked or disliked about their existing schedules, responses were mixed, depending upon specific schedule worked and life circumstances of individual participants. The most consistently made *positive comments* about existing schedules were the number of consecutive days off (for those who work 11 hour shifts), the mix of weekends/weekdays off, the ability to work consistent days or shifts (for those where schedules allowed this), working part time and being able to pick up extra shifts (for those who work part time), participating in self-scheduling (for those who self schedule) and being afforded the flexibility to change shifts.

The most consistently made *negative comments* about existing schedules were having to work high numbers of nights and weekends, working six shifts in a row (full time, 7.5 hour shift schedule), having days off broken up (part time schedules), organizing child care around 11 hour shifts and/or weekends, difficulties getting vacations or LOAs when requested and an overall lack of receptivity by management to increasing the number of part time positions. A few participants commented negatively on the casual call in language in the collective agreement, feeling that it resulted in “undesired” shifts being filled by junior nurses or left vacant (to be filled with overtime) and part timers only being offered shifts “left over” by the casuals. A few others commented that inflexible scheduling sometimes resulted in full time staff leaving hospital nursing or moving to casual and then leaving hospital nursing.

*Suggestions to improve existing schedules* included creating shorter shifts during busy periods (e.g., 1900-2300 hours), creating shifts with varying start times, adding more part time positions, implementing self-scheduling, establishing permanent shifts, reducing the “rules” around shift swapping, allowing part time nurses to “bank time” and take back at a later date, allowing nurses to transfer from full time to part time status (and visa versa) for defined periods of time, creating positions for nurses to work in full or part time

positions which cover two units within a hospital or two units at two different hospitals (job variety), creating more positions of 7.5 hour shifts, allowing shift swaps without having to have authorization, creating positions with earlier start times (better for commuting and on site parking), establishing permanent relief lines and introducing a nine day fortnight schedule for those working days, Monday to Friday. The importance of flexibility on the part of the Manager, Staff and Union was consistently commented upon.

Other more broadly *retention related suggestions* included legitimizing nurses taking a “refresher nap” during the night shift (and authorize a place for this to occur), enhancing educational opportunities and offering financial assistance to attend, establishing mentorship programs and other supports for newly graduated nurses, creating support positions to allow nurses to focus on nursing activities (e.g., aides, porters and/or housekeepers), providing opportunities for team building, exploring child care options (e.g., 24/7 on site child care facility; offering subsidies to nearby day cares to remain open longer hours), creating opportunities for staff nurses to advance and finding ways to value nurses and nursing.

In seeking ways to encourage senior nurses to work past age 60, the most common suggestion was to allow nurses in this age category to reduce their hours of work (part time and/or casual) without a negative impact on their pensions. Other suggestions included creating part time, 7.5 hour and 4.0 hour lines and offering them to senior nurses on a priority basis, creating opportunities for senior nurses to work in less physically demanding roles (e.g., mentoring roles, project roles, paired with an “orderly” type position) and removing the mandatory retirement age of 65. Overall, participants were very supportive of encouraging nurses to work past age 60 and felt their experience would be an asset both to patients and to younger nurses.

The reaction of participants was mixed as to ways of better accommodating injured nurses or nurses who have been off work for other health reasons or other temporary stressors for extended periods of time. Many felt that too much was already being done to accommodate these nurses and placed an unfair burden on colleagues. Others were more sympathetic and felt nurses should be more supportive of other nurses who required accommodation to return to work. Few concrete suggestions were provided for this group, other than working to foster an overall climate of caring and support and looking “outside the box” in terms of ways to accommodate nurses returning to work (e.g., different jobs or different or shorter shifts).

When asked for incentives to encourage nurses to choose full time work, the overwhelming response was *stop trying to encourage nurses to work full time*. Participants felt that most nurses do not want to work full time, both due to the emotional and physical demands of the job and the personal demands outside of the job. Participants unanimously agreed that part time positions result in an overall happier, healthier workforce. The popularity of .75 FTE and .8 FTE positions was noted. The availability of part time positions will assume even greater importance as the workforce ages.

In seeking feedback about ways to change the way work is done to accommodate nurse's shift preferences and schedules, most felt this would be a massive undertaking. Nurse's work is often driven by other departments that do not provide a 24/7 service (e.g., OT, PT, diagnostic services). Flexibility in nurse's schedules would require other services to be provided at different times. One suggestion was to extend hours of service in other departments Monday through Thursday in order to "front load" nursing requirements during the week, allowing for more nurses to be off during weekends. The overall feedback on this option and other options involving changing the way work is done to accommodate nurse's schedules is that it would not be viable without full scale system changes.

As one of the final questions, participants were asked for specific feedback on the pros and cons of each of seven innovative scheduling options for quality of worklife and for patient/resident care. The options receiving the highest rates of interest among participants were as follows (in descending order):

- Innovative job sharing
- Tours of difficult to fill shifts.
- Permanent shifts or consistent days off.
- Flexible self- scheduling.
- Permanent relief lines.
- Innovative shift lengths and times.
- Periodic bidding on new schedules (least favoured).

One shortcoming of this phase of the project was that attendance at the focus groups was lower than anticipated, primarily a timing issue due to job action, student exams and difficulty replacing nurses to attend the groups. Despite this, focus group participants were very positive about being "heard" and the feedback received was very consistent among the groups as well as with the literature.

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## Themes and Recommendations

One of the important concepts to acknowledge is the continually changing demographics of the nursing workforce, nursing workplace and global environment. A “quick fix” does not exist and establishing a culture, which promotes innovative scheduling in concert with these changes, needs to be the long-term goal. **What may work today may not work tomorrow!**

As scheduling does not exist in isolation, the themes and recommendations provided below are drawn from the literature review, internet search and feedback from the Lower Mainland focus groups and are reflective of both scheduling and overall retention issues. Many of the recommendations fall within the collective agreement, while others fall outside the collective agreement. Please note that those falling outside the collective agreement require discussion and approval to implement, as outlined in Section Four of this Resource Guide. Such changes cannot be approved solely at the local level.<sup>7</sup>

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### *Scheduling Related*

**Theme #1: One size scheduling does not fit all, even within a single nursing area/unit.**

Nurses, like others, go through multiple life stages during their working years. The need to acknowledge this through the creation of multiple scheduling options for a given work area/unit was a consistent theme. Units/areas in which a mix of scheduling options is available seem more likely to retain nurses, as it makes it possible to work different options as their life changes. In general, younger nurses preferred full time, 12 hour shifts (with a combination of days and nights), nurses in their 30's and 40s preferred part time, 7.5, 12 hour shifts or a combination of shifts (many preferred permanent shifts with consistent days off in order to facilitate child care) and nurses in their 50's and 60's preferred part time, 7.5 hour shifts (most would prefer days and evenings, no nights).

Generally most units/areas develop their schedules with a combination of full and part time lines and either 7.5 hour or 12 hour shifts. This limited selection of options results in frequent transfers of nurses to other units/areas/hospitals or to casual status in order to obtain the flexibility in scheduling they require as their life changes. It is likely that by units/areas increasing their array of scheduling options offered, nurses will be more likely to remain on the unit and in regular employment for longer periods of time. Examples of the array of scheduling options that a unit/area might be wise to develop are the following:

- Lines with varying FTE components (e.g., 1.0 FTE, .8 FTE, .7 FTE, .6 FTE, .5 FTE).
- Lines with varying shift lengths (e.g., 7.5 hour, 11 hour and combinations of 7.5 and 11 hour).

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<sup>7</sup> These materials were developed during Phase 1 of this project, at which time HEABC was not a participant.

- Lines with varying start times (e.g., 0700-1900 hours, 0800-2000 hours and 0900-2100 hours).
- Lines which allow nurses to control their specific schedules and vary their FTE component according to their personal needs (e.g., 3 nurses share 2 full time lines and are responsible to cover all shifts; 5 nurses share responsibility to provide coverage 24 hours per day).
- Part time lines that are made up primarily of difficult to fill shifts (e.g., work 3 out of 4 weekends, straight nights).
- Lines which facilitate relief of vacations and acknowledge employee preferences (i.e., permanent vacation relief lines, for which specific, individual schedules are developed and posted 6-8 weeks in advance).

***Recommendations:***

1. Encourage units/areas to develop schedules that provide an array of options and allow staff to transfer between lines as their life circumstances change.
2. Support units/areas in the development of schedules with multiple options (e.g., establish a central scheduling resource; provide workshops for managers and staff on innovative scheduling options; make available computerized schedule building support).

**Theme #2: The potential exists to be more innovative with job sharing.**

For the most part, job sharing refers to two nurses splitting one full time line. In most cases, job sharing is a means to allow nurses to work part time, with more flexibility in hours than is available in a standard part time line. Job sharing nurses typically work .5 FTE, with little variation.

Job sharing has the potential to be much more innovative than is practiced currently, and may include variations such as the following:

- Job sharing more lines among more job sharing partners (e.g., 2 full time lines between 3 job sharing partners, 4 full time lines between 6 job sharing partners, 3 full time lines between 3 job sharing partners) to create a variety of FTE options as well as flexibility in days worked.
- Allowing variable FTEs between job sharing partners (e.g., line may be split .75/.25 for one month, then .5/.5, then .25/.75) to allow flexibility with individual's personal lives.
- Job sharing 11 hour shifts (e.g., 5.5 hour shift each, 7.5 and 4 hour shifts) to allow job sharing partners to work shorter shifts.
- Allocating job shared shifts over extended periods of time (e.g., one partner works 3 months full time, then takes 3 months off) to allow job sharing partners to take extended periods of absence.
- Job sharing lines between two different clinical areas (e.g., .5 FTE in Emergency, .5 FTE in ICU) to promote job variety among job sharing partners.

Many of the focus group participants were very interested in the concept of innovative job sharing and felt that it would afford them more control and flexibility in their lives, including the potential to share child care, travel or enroll in educational programs. In reality, job sharing can be seen as a variation on self-scheduling.

***Recommendation:***

3. Explore innovative options for job sharing, including:
  - Job sharing more lines among more job sharing partners.
  - Allowing variable FTEs between job sharing partners.
  - Job sharing 11 hour shifts.
  - Allocating job shared shifts over extended periods of time.
  - Job sharing lines between two different clinical areas.

**Theme #3: There is interest in creating schedules of difficult to fill shifts, especially if days off are consistent. and/or work is less than full time hours for fulltime pay and benefits.**

Quite a number of focus group participants were interested in creating schedules of difficult to fill shifts, especially if days off were consistent (facilitating child care and/or enrolment in educational programs) and/or work is less than full time hours for full time pay and benefits. The creation of such schedules would also benefit other nurses who would have to work less of these types of shifts.

***Recommendation:***

Explore options for creating schedules comprised primarily of difficult to fill shifts, including schedules with consistent days off and schedules of less than full time hours but at full time pay.<sup>8</sup>

**Theme #4: Many misunderstandings and misperceptions exist about self-scheduling.**

While self-scheduling affords many of the qualities focus group participants are seeking in terms of scheduling (i.e., greater control over schedules, potential for consistent days off and consistent shifts, etc), there was a general lack of understanding among both managers and staff nurses in the focus groups about how it works and its potential benefits. Many participants felt that seniority was the only determining factor in receiving preferential shifts.

Of those having experience with self-scheduling, most spoke very highly of it in terms of affording more control for both their work and personal life. Once the concept of self-scheduling was explained to other focus group participants, there was a general interest to learn more and perhaps consider it for their area/unit.

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<sup>8</sup> Please note: the issue of full-time pay for less than full-time work would not be supported by HEABC without extensive consultation amongst the industry.

**Recommendations:**

4. Establish a process to allow staff nurse representatives that have worked with self-scheduling to assist other staff groups to learn more and potentially implement self-scheduling.
5. Consider options for computerized support for units implementing self-scheduling.

**Theme #5: Implementation of innovative scheduling options requires greater flexibility on the part of employers, employees and BCNU.**

A consistently identified theme was the need to build in mechanisms that promote flexibility on the part of employers, employees and BCNU on all aspects of scheduling. It was noted that units/areas in which staff nurses report high levels of satisfaction are those in which the manager and staff use a “common sense” approach to scheduling.

Shift swaps were an area that focus group participants expressed a desire to exercise more control over and to minimize the “paperwork,” and eliminate the “red tape” and need for authorization. Flexibility over vacations was also noted as a desire, although few suggestions were offered, other than implementing self-scheduling.

Innovative scheduling requires a commitment from employers, employees and BCNU. The literature/internet search and industry contacts were consistent in the belief that innovative scheduling results from ideas generated at the local level, most often by staff nurses. To this end, some facilities/organizations/regions have established joint employer/employee committees or processes for promoting/approving flexible scheduling arrangements (e.g., Saskatchewan and Ontario collective agreements).

**Recommendations:**

6. Establish a formalized process that promotes and facilitates local scheduling agreements between employers and unions on an ongoing basis. Include a process to undertake time limited trials of innovative scheduling arrangements on single units/areas (i.e., between a manager and staff) with a minimum of “red tape.”
7. Encourage managers to facilitate nurse’s efforts to swap shifts, including an easier way to match nurses wishing to swap shifts (e.g., “shift swap matching book”) and establishment of criteria and a simple process for nurses to authorize their own shift exchanges.

**Theme #6: Experienced nurses should be supported to work part time, rather than transferring to casual status or leaving hospital**

Nurses consistently commented on the lack of sufficient part time positions and/or the struggle in getting the employer and/or BCNU to agree to convert full time to part time positions (permanently or for temporary periods of time). Part time lines were particularly sought out by nurses with young families (at least for a few years while raising their children) or nurses aged 50 and over (prior to retirement). As the workforce

ages, the latter will become an ever-increasing issue. If part time is not available, these nurses transfer to casual or leave hospital nursing.

***Recommendations:***

8. As opportunities and needs arise, consider ways to increase the proportion of part time to full positions (positions of .8 FTE, .75 FTE and .7 FTE were particularly cited as needs).
9. Create opportunities for nurses to change their status from full to part time and visa versa for defined periods of time (e.g., 1 - 3 years), with a guarantee to return to their former status at the end of the defined period. Operational requirements may require restrictions to be placed on the number allowed to change status at a given time.

**Theme #7: An aging workforce requires re-thinking our existing approaches to scheduling.**

Three key factors (in addition to personal reasons) were consistently identified by focus group participants as scheduling related reasons why senior nurses leave the workforce:

1. Difficulty working 12 hour shifts.
2. Difficulty working night shifts.
3. Impact on pension if they reduce the number of worked hours (or if transfer to casual status).

***Recommendations:***

10. Encourage areas/units to include part time, 7.5 hour shift lines as part of their baseline schedules (preferably days and evenings if staffing patterns allow).
11. Explore mechanisms for nurses to reduce their FTE status after age 60 without negatively impacting their pensions.

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***Broader Retention Related***

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**Theme #1: Scheduling needs to be considered within the larger context of retention – scheduling is only one aspect.**

Focus group participants frequently made reference to the fact that scheduling is only one aspect of retention. In the minds of many, scheduling is less important than some other aspects, as evidenced by the 66% of *staff nurse* focus group participants that indicated their relative satisfaction with their existing schedules. Examples of other retention related issues/suggestions raised by focus group participants as important were as follows:

- Availability of strong and innovative leadership at the unit level. Current structures rely heavily on the skills, attitude and availability of front line managers – if the

manager lacks the skills, desire or time for staff, this impacts negatively on staff morale and retention.

- Time off and financial support (e.g., bursaries, subsidies) for education, including higher level education, specialty education and ongoing continuing education (i.e., conferences and regular inservices).
- Provision of additional support for new nurses entering the system (e.g., extended orientation for all areas; preceptorship and mentorship programs).
- Creation of opportunities for advancement (clinical, administrative and research). With the flattening of organizational structures and the movement towards program management, fewer opportunities exist for staff nurses wishing to advance (e.g., loss of many Assistant Head Nurse, Head Nurse, Team Leader positions). Most positions that do exist are managerial, require a master's degree and have broad spans of control.
- Creation of opportunities for work variation (e.g., different types of positions for temporary periods, establishment of positions that cross more than one specialty area and/or site).

***Recommendations:***

12. Facilitate the availability of strong, innovative leaders at the unit level (e.g., review organizational structures to ensure effective spans of control, ensure quality methods are in place to select competent applicants, and provide ongoing education for leaders on the importance of involving staff in decision making).
13. Encourage appropriate representation of staff nurses on committees that make decisions which impact on staff nurses (e.g. provision of new or different services).
14. Increase access to and provide financial support for nurses to pursue additional education. Examples might include:
  - Negotiate with educational institutions to offer on site (hospital) courses towards advanced degrees.
  - Provide relief to allow staff to attend inservices.
  - Provide financial support for time and expenses for nurses to attend conferences.
  - Pay up front for educational courses (in order that staff do not have to pay and await reimbursement);
  - Pay time and expenses for mandatory courses such as ACLS, newborn resuscitation, and CPR.
  - Facilitate time off for nurses working on advanced degrees.
15. Explore options to create opportunities for advancement, particularly for staff nurses.
16. Establish preceptorship and mentorship programs for newly graduated and/or hired nurses.
17. Consider options for nurses to work in full or part time positions covering 2 units within a hospital or 2 units at 2 different hospitals (increase job variety and variety of shift lengths and start times).

**Theme #2: Creative ways to support nurses with young children to manage shift work need to be found**

Child care was cited as one of the most common reasons for nurses leaving regular and/or casual employment. Juggling work and family life is a challenge at the best of times, but shift and weekend work further exacerbates the challenge for nurses. Child care arrangements that can accommodate rotating days and shifts are difficult if not impossible to find. Focus group participants identified arranging child care for short notice calls (casuals and part timers) and weekends to be the highest priority.

***Recommendations:***

18. As able, offer 24/7 day care.
19. Subsidize community day cares to remain open for extended hours, in the summer and on weekends. Consider offering reduced rates for nurses who utilize these day cares and agree to work difficult to fill shifts.

**Theme #3: An aging workforce requires changing the way work is done to reduce the physical demands of the job**

Focus group participants indicated that physical stamina is a major factor in influencing the age at which nurses leave regular employment and/or retire. With 4,250 or 16% of nurses working in the South Fraser and Vancouver/Richmond Health regions aged 55 and over, this is becoming more and more a factor.

***Recommendations:***

20. Increase the availability of state of the art lifting equipment, electric beds and other supports to reduce the physical demands for nurses.
21. For areas with consistent heavy lifting and high rates of injuries, consider reinstating support roles such as “lift teams” or orderlies.
22. Create positions that allow experienced nurses to use their clinical expertise in less physically demanding ways (e.g., mentors/preceptors, instructors, telephone nurse, break relief).

**Theme #4: Integrating nurses back into the workforce after extended periods off (sick or with an injury) requires a shift in thinking and attitude.**

For the most part, focus group participants felt that scheduling was quite flexible for nurses that have been off for extended periods (sick or with a work related injury). In fact, some commented that accommodating these nurses was often at the expense of other nurses working on the area/unit (often resulted in other nurses having to work more shift work). What needs to be looked at, according to many focus group participants, is the type of work and areas these nurses are often asked to work in. Psychiatry was used as an example as it is not uncommon to place a nurse returning from a long term back injury in psychiatry, as the physical demands are less. The latter was cited as a concern as psychiatry still has the potential to require physical intervention in crises, not to mention a desire to work in the area. Retraining nurses for positions in information systems or

other departments were cited as successful examples. Although brought forward as an issue, few concrete recommendations were provided.

***Recommendation:***

23. Consider work options both within and outside nursing for nurses who have been off sick or injured for extended periods of time and who can no longer manage the physical demands of their existing position.

**Theme #5: Support to newly graduated nurses needs to be provided.**

Focus group participants frequently commented on the inadequate preparation of newly graduate nurses to manage the demands of existing workloads. This inadequate preparation impacts both on the newly graduated nurses as well as experienced nurses who are continually having to assume higher levels of responsibility to make up for this “shortfall.” Mentorship/preceptorship and the undergraduate nursing programs were noted very positively in the hospitals where these have been put into place. Other positive initiatives cited were extended orientation programs and the availability of Nurse Managers, Educators and Clinicians.

***Recommendations:***

24. Continue the implementation of programs to support newly graduated nurses (e.g., mentorship/preceptorship, extended orientation).
25. Continue to lobby nursing schools to increase the amount of clinical experience in their programs.

**Theme #6: The existing nursing culture needs to shift to ensure nurses are valued and value each other.**

Valuing nurses was a common theme among focus group participants. Valuing nurses was used in a variety of contexts, including the valuing of nurses and their role by management, other health care team members and the public as well as the valuing of nurses by nurses. The need to create team building opportunities was stressed, as was the need for system changes to allow and recognize nurses working to the full potential of their role. Structures need to be in place which support nurses in bringing forward concerns related to patient/resident care and allowing them to learn from the experience of others (e.g., Winnipeg cardiology case, Susan Nelles case). Mentorship programs were reported as positive in facilitating the development of valuing relationships between experienced and novice nurses. Expectations of nurses by management, other health care team members and the public need to be realistic.

Input by nurses into decisions which impact on the quality of work life was seen as important, as was regular recognition for a job well done (monetary and/or non-monetary). Participants acknowledged the importance of nurses recognizing and supporting other nurses and the need for more celebration within nursing.

***Recommendations:***

26. Establish structures for nurses to value other nurses (e.g., peer recognition and mentorship programs).
27. Establish structures for nurses to provide input into decisions which impact on their working lives such as nursing practice councils (see recommendation #14 above).
28. Develop team building strategies for health care professionals that create respect and understanding of each others roles and scopes of practice.
29. Provide recognition to nurses through the use of non-monetary “perks” (e.g., sweatshirts, free parking, subsidized day care, supply uniforms, hot food for staff working nights).

## Summary

The focus of this project was to promote innovative scheduling practices for nurses. To this end, a literature/internet search and industry practices survey of innovative scheduling practices was completed and 14 focus groups of managers and nurses were conducted to obtain feedback on innovative scheduling options. From these activities, the consulting team developed a list of themes and accompanying recommendations.

These themes and recommendations were provided to the Project Advisory Committee as completion of Phase I of the project. Phase II, is intended to use these themes and recommendations to identify, implement and evaluate innovative pilot scheduling projects. Evaluation of these projects will assist in gaining a better understanding of the needs of the nursing workforce, both in terms of scheduling and other retention related issues.



## **SECTION THREE**

# **Framework for Identifying Innovative Scheduling Options**



## FRAMEWORK FOR IDENTIFYING INNOVATIVE SCHEDULING OPTIONS

Many variations of shift schedules are possible. Many of these options fall within the collective agreement, while others fall outside the collective agreement. Those falling outside the collective agreement require discussion and approval to implement, as outlined in Section Four of this Resource Guide. Most of the variations in shift schedules can be categorized into one of the following:

### A. Regularity of the Shift

- Fixed shifts (e.g., straight days, evenings or nights) vs rotating shifts (e.g., one week of days, one week of evenings).
- Rapid rotation (e.g., 2 days, 3 nights or 1 week days, 1 week nights) vs slow rotation (3 months days, 3 months nights).

### B. Regularity of Days Off

- Consistent days off (e.g., Sunday and Monday) vs variable days off (e.g., Monday and Tuesday one week, Wednesday and Thursday the next).

### C. Varied Length of Shift

- 4 vs 8 vs 10 vs 12 hour shift.
- Some organizations have a “working parent” option (0900-1400 hours).

### D. Varied Start and Stop Times

- Start (therefore stop) times may vary each day for individual employees (mutual agreement or scheduled) or for the entire unit.
- Stop times may also vary due to extended lunch breaks.
- Some organizations adhere to the principle of minimum staffing during core hours/days.

### E. Varied Numbers of Work Hours per Time Period

- Work hours may vary each week, month, 3 or 6 month period (e.g., work full time one month, off the next month; work 75% one week, 25% the next week).
- Could include options such as working full time for 4 years @80% salary, then taking 1 year off @ 80% salary (has tax advantages).

### F. Compressed Work Week

- The equivalent of a full time workweek is worked in less than 5 days as a result of extended length shifts.
- The most common shift lengths are 8, 10 and 12 hours but can be any number of hours in between; some use even 14 and 24 hours shifts.

## G. Weekend Alternative Plans

- Some jurisdictions have provided incentives for those agreeing to consistently work the less desirable shifts (weekends and nights). In these cases, workers may be paid and considered a full time employees but only work 24 – 30 hours on the weekend (usually work every weekend but may be provided relief for an occasional weekend every few months).

Weekend alternative plans such as the Baylor model are not permissible under the current NBA/HEABC collective agreement.<sup>9</sup>

## H. Job Sharing

- Two or more employees share one or more positions.
- Depending upon the setting, employees may share benefits, cover each other's vacations, schedule shifts amongst themselves and vary the hours worked by each employee.

## I. Self-Scheduling

- Employees schedule their own hours, according to a set of pre determined "rules." Several variations exist, as does the level of employer involvement.
- Another variation on self-scheduling is for employees to bid on shifts for defined periods of time (e.g., 6 weeks, 3 months, 6 months, 1 year).

## J. Other Recruitment and Retention Scheduling Related Options

- Allow increased vacation if time taken during non-peak times (e.g., 3 weeks if vacation taken during the summer, 4 weeks if taken during the winter).
- Schedule rotations of on call shifts (e.g., on call for 20 days per month-if called in, get paid for shifts worked-if not called in, get paid for a minimum number of shifts for the period).
- Offer cash payment in lieu of benefits. Alternatively, offer "credits" which can be used to purchase user defined benefits (e.g., medical, dental, pension, university tuition, etc).
- Allow option to continue working past retirement, without a reduction in pension benefits.
- Develop ad hoc or "expert" computer schedules (i.e., based on employee preferences, seniority and "rules").

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<sup>9</sup> Please note that approval of options where full time pay is provided for less than full time hours would require extensive industry consultation prior to approval.



## SECTION FOUR

### Implementing New Schedules/ Schedule Changes

- Preparation for Developing New Schedules/Schedule Changes
- Developing New Schedules
- Implementing and Evaluating New Schedules/Schedule Changes
  - Process
  - Submission
  - Evaluation
- Samples of Schedules with Difference Mixes and Numbers of Staff



## IMPLEMENTING NEW SCHEDULES/ SCHEDULE CHANGES

Implementing new schedules/schedule changes requires careful management. While the schedule change may be easy to identify, the impact on the parties to the change are internal and not so readily identified. The person assigned to a leadership role in such an endeavor needs to ensure that change management principles are used. It is important to ensure that all parties understand the scope of the change, the rationale for it, the potential impact of the change, their role and responsibility in the change and how it will be evaluated. An opportunity should be provided for all parties to have input with an understanding that all suggestions will be considered even though not all suggestions may be used.

This section provides information on the preparation for, development, approval, implementation and evaluation of new schedules/schedule changes.

A significant portion of the content provided below was extracted from the *HEABC/BCNU Shift Rotation Manual: A Guide for Health Care Professionals* (August 1996). Due to changes in the Provincial Collective Agreement, parts of this manual are no longer applicable and should be used in conjunction with the current collective agreement. Copies of the manual are available through HEABC and BCNU.

### ***Preparation for Developing New Schedules/Schedule Changes***

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Before beginning to develop a new schedule, take some time to review:

- Unit workload patterns and, thus, staffing requirements on a day to day basis
  - √ Is the workload the same every day? Or does it fluctuate by day of week?
  - √ Is the workload consistent 24/7? Or are there peak periods during a 24 hour period?
- Unit budget
  - √ What is the total FTE complement for the unit? What is the breakdown of regular to relief FTE?
  - √ How many FTE's are required to support the staffing requirements identified above?
  - √ What is the strategy if the workload and unit budget do not match?
- Types of patients/residents and the care delivery model used on the unit
  - √ What type of patients/residents are cared for on the unit? What type of care delivery model is used on the unit? How does this model impact staffing requirements and shift schedules?
  - √ What staffing mix is used on the unit? How does the staffing mix impact staffing requirements and shift schedules?

- Ratio of full-time to part-time positions
  - √ Given the staffing requirements, the unit budget and the care delivery model, what is the desired mix of full time to part time staff?
- Scheduling provisions as set out in the collective agreement(s).
- Specific requirements if implementing an extended work day, compressed work week or flexible (innovative) schedule.

Schedules vary in shift length and in repetitiveness. These are illustrated in the groupings below.

### Variations in Shift Length

#### **7.2 or 7.5 Hour Work Day Schedule**

- 7.2 or 7.5 hour shift schedules are covered by the scheduling provisions of the collective agreement.

#### **Standard Extended Work Day Schedule**

- Any schedule with shifts longer than 7.5 hours (e.g., 9, 11, 11.25 or 11.5 hours).

#### **Two Part Work Day Schedule**

- One group of employees work a schedule of one shift length (e.g., 7.5 hours) and another group works a schedule of another shift length (e.g., 11 hours).

#### **Combined Work Day Schedule**

- All employees rotate through a schedule consisting of 2 or more shift lengths (e.g., 7.5 hours and 11 hours).

#### **Non Standard Work Day Schedule**

- Shift schedule is a non standard length (i.e., other than 7.2, 7.5, 11, 11.25 or 11.5 hours). Most often used on units that are not staffed on a 24/7 basis.

### Variations in the Repetitiveness of the Schedule

#### **Line Rotation**

- Each employee works a separate master schedule. Schedule may be one to several weeks in length.

#### **Block Rotation**

- A group of employees (may be all the employees on a unit) work a common master schedule. All employees rotate through all weeks of the schedule. Schedules may be two to several weeks in length.

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## Developing New Schedules

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The need to develop a new schedule or change an existing schedule may arise for a number of different reasons. Examples of reasons include changes in the type of patient/resident serviced, changes in the staffing levels or staff mix, changes in the availability of support systems and staff, or change in the care delivery system. Schedule changes may be initiated at the request of staff.

Whatever is motivating the need for change, the result is that a new schedule must be developed. To do this, the following three basic steps must be followed:

### Step One: Determine the number of FTE's and staff required on the unit.

If the number of FTE's, staff and coverage per shift is known, proceed to step 2.

#### **Option #1: If the number of staff desired on each shift is known (i.e., staffing coverage is to be 3 on days, 3 on nights), but the total number of staff required to provide coverage is not known.**

- (a) Calculate the number of scheduled hours required per week to provide the desired coverage, as follows:
  - # of staff desired per shift x # of shifts per day x # of days worked per week x # of hours per shift.
- (b) Calculate the total number of FTE's required to provide the desired coverage, as follows:
  - # of scheduled hours required per week (as per step above); divided by 34.483 hours per week.<sup>10</sup>
- (c) Identify the number of employees required to fill the calculated FTE's (as per step above). The number of employees will depend upon the desired ratio of full-time to part-time.

#### **Option #2: If the total number of FTE's and staff available to provide coverage is known but the number of staff desired on each shift is not known.**

- (a) Calculate the number of hours available to provide coverage per week.
  - # of FTE's x 34.483 hours
- (b) Calculate the number of staff available to provide coverage per shift.

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<sup>10</sup> This is calculated as follows:

- 52.2 weeks per year x 36 paid hours per week = 1,879.2 paid hours per year; minus
- 11 statutory holidays per year x 7.2 paid hours per statutory holidays = 79.2 paid statutory holiday hours per year; equals
- 1,800 paid work hours per year/52.2 weeks per year = 34.483 paid work hours per week.

- # of hours per week (as per step above) divided by # of days coverage required per week divided by # of hours per shift divided by # of shifts requiring coverage per day.

### Step Two: Determine the framework of the schedule

- (a) Determine the length of the shifts and length of the schedule. Generally speaking the most efficient and equitable schedule has everyone working the same pattern (block rotation). This requires that the # of weeks equals the # of staff, or multiples thereof.
- (b) Determine how many times the schedule repeats itself in a year (52.2 weeks divided by the # of weeks in the schedule).
- (c) Determine how many shifts must be scheduled per rotation cycle (# of weeks in a rotation x 34.483 divided by the # of paid hours per shift).

### Step Three: Create the schedule

There is no magic formula which will work in every instance. Schedules must be consistent with the scheduling parameters in the collective agreement, for example the following must apply (unless a waiver for a specific incumbent or a special memorandum of agreement is in place):

- Maximum # of shifts in a row is 6 (7.5 hr) or 4 (11 hr).
  - Minimum # of weekends off is one weekend off in 3 weekends, averaged over 9 weeks.
  - Minimum # of consecutive days off is 2 (full time RN's).
  - Minimum # of hours off after a tour of night duty is 48 hours.
  - Annual imbalance of hours shall not exceed 12 hours/year.
- (a) Using graph paper and a calculator (using excel will "count" the shifts and calculate the number of hours automatically) mark in the shifts that are most restrictive first (i.e., every second weekend off), then build from there.
  - (b) Put the days of the week along the top of the graph. Put the # of weeks in the schedule along the left-hand side of the graph.
  - (c) Include start and stop times for each shift on the schedule as well as designated days for statutory holidays.

**EXAMPLE:**

|    | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|----|-----|-----|-----|-----|------|-----|-------|
| 1  |     |     |     |     |      |     |       |
| 2  |     |     |     |     |      |     |       |
| 3  |     |     |     |     |      |     |       |
| 4  |     |     |     |     |      |     |       |
| 5  |     |     |     |     |      |     |       |
| 6  |     |     |     |     |      |     |       |
| 7  |     |     |     |     |      |     |       |
| 8  |     |     |     |     |      |     |       |
| 9  |     |     |     |     |      |     |       |
| 10 |     |     |     |     |      |     |       |

***Implementing and Evaluating New Schedules/Schedule Changes***

**Process**

1. The collective agreement (Article 25) identifies the development of a master work schedule as the employer’s responsibility. Whenever possible, such work schedules should be established by mutual agreement between the employer and regular employees at a local level. Where mutual agreement cannot be achieved, the employer may unilaterally implement a schedule that is consistent with the collective agreement but may do so only *after* following the six steps described under point 4.
2. Standard schedules may provide for 7.2, 7.5 and other extended workday shifts. The most common types of work schedules include:
  - 7.2/7.5 hour work schedules;
  - Extended workday schedules with a single shift length (i.e., all shifts worked in the schedule are 11 hour shifts);
  - Two-part work schedules where one group of employees work a schedule of one length (i.e. 7.5 hours) and another group of employees work a schedule of another shift length (i.e., 11 hours); or
  - Combination schedules where employees rotate through a schedule which is composed of 2 or more shift lengths (i.e., 7.2 hours, 7.5 hours, and 11 hours).
3. The collective agreement (Article 25.03) allows for the development and implementation of flexible hours for scheduling particular positions, when agreed to by the employer and employees at a worksite. This article also enables HEABC and the Union to consider and, if acceptable, approve variations to the collective agreement to accommodate flexible scheduling, the process of which is described under point 12.

## Submission

### Implementing a New or Change in Existing Shift Schedule:

4. In the event that an employer wishes to introduce a new shift schedule, the following six steps must occur:
  - The employer must give the nurses a clear and detailed outline of what it wishes to do.
  - The employer must have a good reason(s) for making the proposal in the first place, and it must express the reason(s) to the nurses and be prepared to engage in an explanatory dialogue.
  - The employer must invite the nurses to respond to the proposal, and must provide them a reasonable opportunity to formulate a response and develop their own proposal.
  - The employer must give bona fide consideration to any proposal which the nurses put forward and, if not accepted, be prepared to provide a reasonable explanation of the reasons.
  - Within this frame, the employer must make every reasonable effort to secure mutuality.
  - The employer's actions and its proposed schedule of shifts must not be in breach of any other provision of the collective agreement (unless the Employer and Union agree to the variation as per the process described under point 12).
5. In Acute Care (acute care as listed in the Appendices of the collective agreement), if the new schedule results in one or more employees working one of the following scheduling arrangements, these arrangements must be agreed to between the employer and the employee(s)<sup>11, 12</sup>:
  - Working three shifts.
  - Working fixed evenings or nights.
  - Working more than 6 consecutive shifts.
  - Non-consecutive off duty days.
  - Not receiving two clear off-duty shifts when changing shifts and at least forty-eight hours off-duty after completing a tour of night duty.
6. If the new schedule does not schedule employees off duty for an average of not less than one weekend in every three weekends in each nine week period, these arrangements must be agreed to between the Employer and the Nurses' Bargaining Association (Union).

### Initiating Extended Work Day Shift Schedule (>7.5 hours):

7. The procedures to (1) change from a standard length work day to an extended work day shift schedule; (2) open a new unit using an extended work day shift schedule; or (3) establish a non-standard extended shift schedules are outlined in Section III, Part II of the Shift Rotation Manual. Revisions to existing extended work day and compressed work week schedules are

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<sup>11</sup> These agreements are on an incumbent only basis.

<sup>12</sup> Some variation on these requirements exists for employees in Continuing Care and for Employees on Flexible Work Schedules: see Article 25.06 and Article 25.07.

outlined in Section III, Part III. For convenience, replicates of these sections are available in Appendix D.

8. The calculations for proposed extended work day schedules are done using the Calculation Sheet for Extended Work Day/Compressed Work Week Schedule and employees must sign a Release of Overtime for Extended Work Day/Compressed Work Week Schedule. The signatures of ninety (90) percent of all regular full-time and regular part-time nurses who will be working shifts longer than 8 hours must be obtained. These forms are submitted to the local Human Resources department who will review the schedule to ensure compliance with the collective agreement.
9. Following agreement in principle on the proposed schedule, the Employer will send to HEABC, with a copy to BCNU, a covering letter requesting the preparation of a Memorandum of Agreement by HEABC for the proposed schedule. The covering letter should be accompanied by the following documents:
  - Release of Overtime for Extended Work Day/Compressed Work Week. Include the required percentage of signatures of regular employees, the proposed hours of work, the name of the organization, the name of the ward/department/unit and the signature of a local BCNU shop steward.
  - Calculation Sheet for Extended Work Day/Compressed Work Week. Ensure calculations are done to 3 decimal places and that the initial imbalance of hours does not exceed 12 per year.
  - A copy of the schedule. The schedule should include one full rotation, shift start and stop times, statutory holidays for both full and part-time staff and the name of the unit.
  - Once approved by BCNU and HEABC, the new schedule can be implemented as long as the schedule is posted six (6) weeks in advance.

### Implementing Self Scheduling

10. If the proposed change is to introduce self-scheduling, the process will be developed collaboratively among nurses, management, the local BCNU steward and local Human Resources personnel. Because self scheduling involves a change to the collective agreement, the BCNU Labour Relations Officer and HEABC Consultant need to be involved. The unit must first identify an approved master schedule which will be implemented if either party chooses to cancel the self-scheduling arrangement.
11. In order for self-scheduling to be approved for a 6 month trial period, a minimum of 80% of regular full-time and regular part-time nurses must approve it. Once approved by nurses, the master schedule (along with the required documentation for extended shift schedules and any waivers) will be submitted to the local Human Resources department, who will forward a copy to BCNU and HEABC (with a copy of self-scheduling guidelines developed for the area). Once approved by BCNU and HEABC, self-scheduling can be implemented as long as the schedule is posted 6 weeks in advance (as per the collective agreement). Continuation of self-scheduling at the end of the 6 month trial period is dependent on the continued approval of management and 90% of regular full-time and regular part-time nurses.

**Implementing a Change Resulting in a Variation from the Collective Agreement:**

12. If the new schedule results in a variation of the collective agreement the variance will be discussed between the worksite BCNU Labour Relations Officer, the worksite Human Resources representative, the Manager and the employee(s) impacted. If agreed to by all parties, approval for a variance may be sought from the Nurses' Bargaining Association (NBA) and HEABC. If approved, a memorandum of agreement (MOA) will be signed between HEABC, the NBA and the employer. Once the MOA is approved, the new schedule can be implemented as long as the schedule is posted 6 weeks in advance as per the collective agreement.

**Evaluation**

Evaluation is an essential component of any change process. It is an integral part of this project and is designed to provide information on the success of the new/changed schedule and to gather information helpful for improvements for the future.

Samples of tools to evaluate the impact of new schedules/schedule changes are provided in Appendix E.

***Samples of Schedules***

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As indicated in Section 2, flexible and innovative scheduling is an important factor in creating a healthy work environment. In recent years effort has been put into expanding scheduling options and many variations of schedules exist today. Support for continuing to explore scheduling options comes from staff, managers and the union.

Samples of standard and innovative schedules, as well as unit guidelines for self-scheduling are provided in Appendix F.



## SECTION FIVE

### Appendices

- Appendix A: Literature Search on Innovative Scheduling Practices
- Appendix B: Internet Search on Innovative Scheduling Practices
- Appendix C: Interviews with Industry Contacts Re: Innovative Scheduling
- Appendix D: Extended Work Day and Compressed Work Week Schedule
- Appendix E: Samples of Tools to Evaluate the Impact of Schedule Changes (Cover Letter, Manager & RN Surveys)
- Appendix F: Samples of Schedules (Standard, Innovative and Guidelines for Self Scheduling)



## APPENDIX A: LITERATURE SEARCH RE INNOVATIVE SCHEDULING (Completed in 2001)

| Art # | Focus of the Article  | Initiative  | Description of Scheduling   | Benefits Noted for Staff   | Benefits Noted for Mgt   | Challenges Noted for Mgt  | Challenges Noted for Staff   |
|-------|---|---|---|--|--|---|--|
| 1     | Workplace socialization and research on the use of “flex nursing” (sample of 120 RNs and 46 flex RNs in one setting).       | Nurses working flexible schedules (self-scheduling).  | Staff identify the shifts and areas they wish to work. Staff are paid more than regular nurses because of no benefits.  | Allows for choice of shift and area.   | Institutions use for variable census.<br><br>Can be cancelled by institution if necessary e.g. low census. |   |  |
| 2     | Formalized flextime (This meant day shift in this article but includes tips on how to go about setting up self-scheduling). | Use flex time as a strategic tool, not a perk. Includes: <ul style="list-style-type: none"> <li>• Staggered start times.</li> <li>• Compressed work weeks.</li> <li>• Job sharing.</li> <li>• Part-time.</li> </ul> | 6% of organizations have formal arrangements for flextime ('97). Hewlett Packard program includes staggered start times. Other examples were from Price Waterhouse and Ernst & Young. | Reduces stress.<br>Improves quality of work life.<br><br>Increases productivity during work hours. | Reduces overtime costs (1 example cited a 36% reduction).<br><br>Increases productivity.                   |   |  |
| 3     | Job sharing.  | 2 employees share the responsibilities and benefits of a single full-time position.   | Usually work 2 days 1 week and 3 the next. Weekends or on-call can be split or done on a rotating basis.<br><br>Communication is key.   | Evidence of administration support.<br><br>Allows for personal pursuits.                           | Increased efficiency and productivity.<br><br>R &R leverage.<br><br>Cost containment.                      | Administration/ staff opposition.<br><br>Inconsistencies among job-sharers. | Incompatibility among job sharers.   |
| 4     | Job sharing (joint union management plan in Saskatchewan).  | Opportunity for permanent FT nurses to reduce hours to a maximum of 50%   | At any given time 10% of employees are job sharing.   | Allows nurses to meet family obligations, maintain bumping rights & be                             | Decreased number of LOA requests.<br><br>Both union and management   |   | 91% of job sharers felt the arrangement allowed them to balance work and family effectively. |

| Art # | Focus of the Article                  | Initiative   | Description of Scheduling   | Benefits Noted for Staff   | Benefits Noted for Mgt  | Challenges Noted for Mgt | Challenges Noted for Staff   |
|-------|---------------------------------------|--|---|--|---|--------------------------|--|
|       |                                       | for a minimum of 6 months and maximum of 2 years.  |   | considered FT in the event of layoffs.   | considered it a win-win.  |                          |  |
| 5     | Flexible firm (NHS in the UK).        | A core group of permanent employees is supplemented by one or more groups of peripheral employees (may not be employees of the firm).  | Employees may be casual, on short-term contracts, or come from external agencies.<br><br>Useful in fluctuating workload situations and in times of nursing shortages.   |  | Brought in during a recession ('80s) and unemployment was the motivator. Continued in the '90s and cost containment was the motivator.  |                          | Nurses may perceive this as casualization of nurses which could be demotivating. |
| 6     | Time care (self rostering).           | A computerized, self-rostering, flexible time system with no standard shift length. Extra hours are accumulated in a "time bank." Staff may draw against this bank to reduce hours worked in a week. | Nurses decide the minimum and maximum staffing levels each hour for one month. Nurses enter the hours they wish to work for the month and the computer prints out a schedule. Staff voluntarily cover shortfalls - shorten, lengthen or change shifts. A point system is assigned to different shifts and each staff has a score. Gaps are then covered by staff with the lowest score. | Staff choose their hours.<br><br>Nurse - led with ownership.<br><br>Fair and equitable.<br><br>Flexible start and finish times.<br><br>Easy to use.<br><br>Quality time off. | Reductions in overtime, banked staff payments & absenteeism.<br><br>Enables staff to critically evaluate their working patterns & practices.<br><br>Staff satisfaction.<br><br>Enhances retention of staff. |                          |  |
| 7     | Self-scheduling with Microsoft Excel. | A 6 week self-scheduling system using Microsoft Excel on a personal computer.  | Combination of 8 and 12 hr shifts.<br><br>All requests are based on established guidelines entered into the computer.   | Staff are able to see a picture of unit coverage.<br><br>Staff have input into their schedules.  | Less time for Managers in scheduling staff.   |                          |  |

| Art # | Focus of the Article   | Initiative   | Description of Scheduling  | Benefits Noted for Staff   | Benefits Noted for Mgt  | Challenges Noted for Mgt  | Challenges Noted for Staff                                      |
|-------|--|--|--|--|---|---|---|
|       |  |  |  | Changes are made based on guidelines or mutual exchanges. Believe coverage has improved & conflicts reduced.           |   |   |   |
| 8     | Self-rostering Neonatal (NHS in UK).   | Nurses are responsible for organizing their own shift patterns and have the opportunity for part-time work.                                      | Staff of 42 is divided into 7 balanced teams with 2 sisters and 4 staff nurses each. Criteria for self-scheduling was established. | Staff take responsibility.<br>Healthier patterns of work.<br>Raises awareness of needs of unit.<br>Staff satisfaction. | No distinction made in article between staff and management benefits.   | Staff need reminders to balance needs of unit with personal needs when changes have to be made to the schedule. | Staff book shifts they wanted regardless of other team members. |
| 9     | Structuring of work life is based on 3 principles: <ul style="list-style-type: none"> <li>• Clarify what's important to employee.</li> <li>• Work &amp; personal life not separate.</li> <li>• Flexibility in how work gets done.</li> </ul> | Enables individuals to schedule work hours to fit own personal lives. For 24/7, have staff input into schedule design to incorporate principles. | 12 hour shifts 3 days on/4 off in first week; 4 on/3 off in 2 <sup>nd</sup> . Work 84 hours over 2 weeks.                          | Predictability of schedule far into the future for planning life.  | Increased productivity and better staff morale<br><br>Improved quality of work because of fewer shifts requiring handover of information. | Keeps the focus on the people aspect as well as the needs of the organization.                                  | More work hours in a two week period.                           |
| 10    | Providing employees with the opportunity to redesign their work increases their commitment to the organization.  | No real discussion on how this was done.   |  | Improved quality of work life.   | Improved performance, increased productivity and quality.   | Developing a formal employee involvement program.   |   |

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## APPENDIX B: INTERNET SEARCH RE INNOVATIVE SCHEDULING (Completed in 2001)

| Web Site/<br>Organization     | Focus of the Web Site  | Description of Scheduling   | Benefits to Staff | Benefits to Management | Comments   |
|-------------------------------|--|---|-------------------|------------------------|--|
| <b>Canadian Nursing Sites</b> |  |   |                   |                        |  |
| Alberta Nurses Union          | Collective Agreement signed in 2001.                           | Relevant articles include the following:<br><br><i>Scheduling:</i><br>Nurses will not be scheduled to work after 1800 hrs prior to days off; will be scheduled 47.5 hrs off between shifts if going from day to night shift; will be scheduled 3 day weekends 1 weekend out of 4.<br><br><i>Positions at Multiple Sites:</i><br>Permanent positions will be created where nurses can work at several sites, creating better jobs with more hours.<br><br><i>Committees:</i><br>The Staffing and Professional Responsibility Committees have been combined to address staffing and professional responsibility more effectively. |                   |                        | A Joint Committee will be initiated to address any issue arising from the collective agreement, including multiple positions, classifications, evaluation of recruitment and retention initiatives, and local conditions on an on-going basis. |
| Ontario Hospital Association  | Recruitment and retention survey done of 55 employers in 1999. | Provides a ranking of which criteria were deemed important for recruitment and retention.   |                   |                        | Hard copy of results of survey is available.   |
| Ontario Nurses Association    | Collective agreement-expired March 31/01.                      | Scheduling options (37.5 hr work week) include: <ul style="list-style-type: none"> <li>• 5 x 7.5 hr shifts.</li> <li>• 11.25 hrs (extended shifts).</li> <li>• Innovative scheduling clause allows for variations from the collective agreement upon local agreement between the employer and association.</li> <li>• Weekend scheduling: If a nurse chooses to work two,</li> </ul>  |                   |                        |  |

| Web Site/<br>Organization                   | Focus of the Web Site  | Description of Scheduling  | Benefits to Staff   | Benefits to Management | Comments  |
|---|--|--|---|------------------------|---|
|   |  | 11.25 hr shifts every weekend, will get paid for full time (37.5 hrs). Will not be paid weekend or shift premiums and vacation must be taken on a full weekend. Single vacation days can be taken in the week.   |   |                        |   |
| <b>U.S. Nursing Sites</b>                   |  |  |   |                        |   |
| American Organization of Nursing Executives | Recruitment and retention study was completed in March 2000.                   | Of the criteria identified for recruitment and retention, many indicated that flexibility in scheduling and benefits were only two of many criteria impacting on recruitment and retention.  |   |                        | Hard copy of the complete criteria list is available. |
| University of North Carolina Hospitals      | Recruitment information on the web site is targeted specifically to OR nurses. | 8, 10 and 12 hr shifts available.<br><br>6 month scheduling contracts, weekend plans (Baylor), permanent evenings and nights with bonuses available. (Please note that weekend alternative plans such as the Baylor model are not permissible under the current NBA/HEABC collective agreement in BC).   | Some scheduling options result in less after hours and weekend shifts for nurses not on special scheduling plans. |                        | See industry contact section for more information.    |
| University of Pennsylvania Hospitals        | Description of scheduling options, for university staff as a whole.            | <p><i>Flexitime:</i> Individualized start and finish times that remain constant each work day.</p> <ul style="list-style-type: none"> <li>• Start and finish times vary daily but the number of hrs worked per day is constant.</li> <li>• Start and finish times and daily hours vary daily but the total number of hrs worked per week is constant.</li> <li>• Extended lunch break times may be offset by additional hrs at the beginning and/or end of the day.</li> </ul> <p><i>Compressed Work Week:</i> Common compressed work schedules for traditional 35 - 40 hr work weeks are as follows:</p> <ul style="list-style-type: none"> <li>• 4 x 8.75 hour (35 hrs)</li> <li>• 4 x 10 hour (40 hrs)</li> <li>• 3 x 10 hour, 1 x 7.5 hour (37.5 hours)</li> </ul> <p><i>Part-Time and Job Sharing.</i> Some job shares may overlap 4 to 6 hrs on one day of the week.</p> |   |                        |   |
| Yakima Medical Centre                       | Provides an overview of the compressed   | <ul style="list-style-type: none"> <li>• 3 x 12 hour shifts have flexibility in days worked. Start and finish times are based on agreements with</li> </ul>  |   |                        | See industry contact section for more                 |

| Web Site/<br>Organization                       | Focus of the Web Site   | Description of Scheduling   | Benefits to Staff  | Benefits to Management | Comments     |
|---|---|---|--|------------------------|--------------|
|   | workweek used in the organization. Approximately 25% of staff work a compressed work week.                                      | managers and staff. Staff may have a “partner” on the following shift to avoid paying overtime to cover the “gaps” between shifts. <ul style="list-style-type: none"> <li>• 8 hour shifts have flexible start and stop times to accommodate peaks, especially in the OR and PAR.</li> <li>• 10 hour shifts working 7 days on, then 7 days off (Pharmacy only)</li> </ul>  |  |                        | information. |
| <b>Non Nursing Sites</b>                        |   |   |  |                        |              |
| Circadian Institute                             | Discussed the impact of shift work on the body’s circadian rhythm. Offers consulting services for the development of schedules. | Includes some general concepts of scheduling and how to avoid pitfalls of making schedule changes.  |  |                        |              |
| Employee Transportation Coordinator Association | To assist employers to develop staff schedules that will help solve office space and parking problems.                          | 9 shifts/80 hours: Work 9 hours x 4 days, 8 hours on the 5 <sup>th</sup> day, 2 days off, 9 hrs x 4 days, 3 days 3 off.<br><br>4 shifts/40 hours: Work 10 hours x 4 days, 3 days off, then repeat<br><br>3 shifts/36 hours: 12 hours x 3 days, 4 days off.  | In 3 shifts/36 hour scenario, staff is paid for 40 hours for working 36 hours. |                        |              |
| Shift - Work.com                                | Consulting company that assists employers to develop schedules to meet business and staff requirements.                         | Several issues about developing schedules are addressed. One of interest is fixed vs rotating shift schedules. Options include: <ul style="list-style-type: none"> <li>• Traditional schedule: Each crew changes from one shift to another weekly.</li> <li>• Slow rotation: Crews change to a new shift every month or every year (or another time frame).</li> <li>• Oscillating: Two shifts rotate back and forth, a third remains fixed.</li> <li>• Partial rotation: A portion of the crew rotates while the rest stay on fixed shifts.</li> </ul> |  |                        |              |



## APPENDIX C: INDUSTRY CONTACTS RE INNOVATIVE SCHEDULING (Contacted in 2001)

### *Forest Industry:*

- Have been downsizing over the past few years.
- Very little turnover as wages are the same throughout industry and workers are mostly long term employees.
- No recruitment or retention issues.
- Majority of staff are male.
- Unionized workers are referred to as hourly workers as opposed to staff who are non-unionized (e.g. supervisors, human resource staff).

Information collected was consistent for several of the companies within the forest industry. Most are either 16 or 24 hour/day operations.

### *Doman Forest Products* (16 hour/day operation):

- Staff rotates every 2 weeks (days and evenings) for 5 x 8 hour shifts.

### *Slocan* (16 hour/day operation):

- Offer a variety of shifts including 5 x 8 (weekends off); 4 x 10 (Monday or Friday + weekends off) and 4 x 12 (4 off, 4 on).
- Most staff really like the 12 hour shifts with 4 days off. More difficult for senior staff.
- Less overtime with 12 hour shifts (staff does not like this part as it affects their incomes).
- Allow mutual exchange of shifts but must notify management in writing.
- Issues other than scheduling are equally important to staff, including a lunchroom with nice surroundings, food machines, shower facilities, etc.

### *Fraser Mills (Division of International Forest Products)* (16 hour/day operation):

- 220 staff work shift work. About 10% of staff is part-time and 2 staff members work casual.
- Work 5 x 8 hrs shifts.
- All work swing shift except by agreement between individuals.
- Only maintenance works weekends (work 9.5 hrs on Friday and 2 x 10 on Saturday & Sunday).
- Scheduling is done manually.
- Vacations are done by seniority for the first eight months of the year. Anyone who has not scheduled by that date is assigned vacation.

***CanFor (Prince George site) and Skeena Pulp (Prince Rupert) 24 hour/day operations:***

- Schedules are 2 days, 2 nights and 4 days off.
- Workers like this schedule and there are no suggestions to change.
- Work is organized by crews so work with the same people each shift.
- Workers are leveled and bid up to cover vacation.
- Generally, all fulltime staff.
- No permanent shifts except 'duty to accommodate' e.g. illness.
- Usually schedule a specific number per shift and rarely alter, except if a boat is in for loading (Prince Rupert) and 'on-call' crews are called in.
- Skeena Pulp may call in some laid off workers if needed to fill gaps.
- Each department (e.g. maintenance), does its own scheduling, including vacation. The person assigned to scheduling also does other office duties.
- Scheduling is computerized but did not know the program

***CHUBB Alarms***

- 24 hour/day security company with 70 employees.
- Historically have used 8 hour shifts; more recently have introduced the option of a 10 hr shift.
- Shifts overlap between 1800 - 2100 (peak period)
- Supervisors work 12 hour shifts - they used to rotate and by choice opted for a permanent shift.
- No problem filling nights as it is quiet and staff often have opportunities to read, relax, etc.
- Use a relief pool for vacations and sick time.

***BC Gas***

- Have 1,000 employees.
- Only 6 positions work a 24 hour shift. Work 12 hour shifts, 0800-2000 and 2000-0800 hours.
- Most 8 hour shift staff work 3 days, 2 nights, then 2 days off.
- Staff may exchange shifts but must put it in writing to management.
- Use a relief pool for vacations.

***Air Traffic Controllers***

- Approximately 2,000 unionized staff across Canada, of which 10-15% are female.
- Staff with 2 controllers on per shift.
- Scheduling is assisted by a software program called Shift Logic (started using 2 years ago) which is designed to take employee input and develop schedules around employee preferences and employer requirements.
- Schedules are done 56 days at a time and the schedule is posted 15 days before the start of the schedule.
- Staff work 17 out of 28 days with 6 days on, 5 days off, then 6 days on, 3 days off, then 5 days on, 3 days off, then repeat. Most shifts are 7.5 hours, with staggered start times.
- No two weeks are alike so staff find it difficult to plan activities outside work.

- Recently joined Canadian Auto Workers (CAW) and scheduling is expected to be a major negotiation issue as staff are unhappy with existing scheduling arrangements.

### ***Airline Customer Service Agents***

- 600 representatives, 40% female/60% male, cover 24 hours.
- Identify core hours when additional staff is needed from the arrival and departure times of planes.
- Currently work Air Canada schedules with 6 rotating days with rotating days off.
- Schedules with former Canadian Airlines were as follows:
  - 13 hour shifts: 3 days on, 4 days off with the same days worked each week and same days off each week.
  - 10 hour shifts: 4 days on, 3 days off with the same days worked each week and same days off each week.
  - 11.25 hour shifts: 3 days one week, 4 days the next.
  - Part time staff filled in any gaps. Shifts were planned for 6 months and each set of 6 months was bid on and awarded by seniority. Shift trading was done commonly. Staff signed up in a book if they wished to trade shifts and this was organized through the person doing the scheduling.
  - Staff generally happy with the schedules and could make plans to do things with 6 month advance schedules.

### ***Ambulance Drivers***

- Work a variety of shift options, most of which are variations of 8 and 12 hour shifts. Length of shift tends to be dependent upon location. For example, in rural areas, 24 hour full coverage is not needed so staff generally work part time and carry a pager outside worked hours.
- Education expenses are reimbursed for full time staff plus they are paid for their time. Part time staff receive reimbursement for expenses, but must go on their own time.

### ***Airline Attendants***

- Airline attendants bid on routes they want to fly and routes are granted on the basis of seniority. Scheduled hours are driven by plane schedules so they don't bid on hours per se.

### ***E Comm***

- Approximately 200 unionized staff, mostly female.
- Staff work 12 hour shifts with four days on, four days off. Start times are staggered, 07-19, 08-20, 09-21.

### ***Fire Fighters***

- Not sure of numbers but only a handful of females.
- Work 4 on, 4 off. Usually work two 10 hour days, then two 14 hour nights, and then four days off.
- Are required to be in the hall during night shifts, but can sleep if not called out to any emergencies.

***Telus***

- Includes the long distance and information operators as well as approximately 40 telesites for repairs. All staff is unionized.
- Schedules vary, depending upon whether 24/7 coverage is required.
  - Some 24/7 departments are trialing 12.5 hour work days - 3 shifts on and no more than 6 shifts worked in a two week period. Required to have 46 hours off between a set of shifts (at the end of the two weeks). Schedules provide some flexibility to have more days off in a row.
  - In construction area that is not a 24/7 department, staff may work a voluntary compressed work week which is 4 days on, 3 days off.
  - Mobility Centres have an agreement for variable start times throughout the day. Work week is 5 x 7.5 hour days.
- Each area trialing variable hours have its own steering committee made up of Union and Management representatives.
- Vacations are scheduled by seniority with requests having to be submitted by the end of March.
- Some job sharing does occur, arranged on a case-by-case situation between individual staff members and their manager.

***University of North Carolina Hospitals***

- Includes 5 hospitals all connected and part of the University of North Carolina (Nursing school is ranked the 4th best in the U.S.).
- Employs 1,400 RN's, 30 LPN's and 150 RNA's (the latter are comparable to care aides and are used in acute care).
- 684 beds (to increase to 700 beds in the fall).
- Offers a total range of services organized around service lines (new in the last year).
- Staff is not unionized – it is against the state law for unions to exist and strikes are not allowed (in any business sector).
- Despite the lack of unionization, the state has some restrictions which guide some scheduling practices, for example:
  - Part time is defined as <20 hours per week or >20 hours per week, but not to exceed 30 hours per week without a reduction in pension money.
  - Dollars (20% premium) can be paid in lieu of benefits if no more than 20 hours per week is worked. If >20 hours per week is worked, benefits must be paid.
- Recruitment is particularly difficult for medical/surgical positions. Most critical care and specialty areas are not a problem although most vacancies are filled by new grads. The latter has resulted in the organization offering a 13-week “orientation” program to allow new grads to function appropriately in a specialty setting. The vacancy rate is approximately 30% for medical/surgical positions.
- Have temporary nursing positions, which are called “travelers” which are not organization specific, but more a phenomenon of the U.S. (southern states in particular). A “traveler” can work in several hospitals within a geographic area.
- UNCH used to have special scheduling options (as per their website); however, these were cancelled as of January 1st, 2001 because neighbouring hospitals offered a \$10+/hour premium to nurses willing to work weekends and several UNCH nurses left for neighbouring hospitals (4 RNs left in one weekend). The UNCH had to put

\$4 million on the table to match this premium and had to cancel their other scheduling options in order to redirect the dollars. The feeling is that this has increased the problem as the other scheduling options provided nurses with choices which they no longer have, so they base their employment decisions on who pays the most; in the long run, the feeling is that the scheduling options will need to be reinstated (had been in place since the mid 80's).

- Most units offer a variation of 8 or 12 hour shifts with rotating days off and could be permanent or rotating shifts. Each unit has two positions available which are shifts outlined in the next section. A nurse must have 18 months experience in the specialty areas or 12 months in medical/surgical before applying for the positions. These are 6-month contract positions and are posted. Preference is given to someone already working on the unit, but can go to someone from another unit or from outside. Nurses liked these contracts as they provided them with opportunities.
- Special scheduling options (now cancelled):
  - a. Weekend 1: Work 12 hour shifts Friday/Saturday/Sunday one week, then Saturday/Sunday the next week (60 hours over 2 weeks) with 2 weekends off every 6 months. Employee gets paid 80 hours every 2 weeks and gets a 60% shift differential for 60 of the hours. 20% of the differential is withheld if off sick. Has the advantage of having more experienced nurses on the weekend and creates a stronger team.
  - b. Weekend 2: Work 2 x 12 hour shifts one weekend, then 2 x 8 hours shifts the next weekend (40 hours over 2 weeks). Can be scheduled for days or nights. Get paid 1.5 times to work weekends. Positions are fulltime and are not paid for hours not worked (e.g., sick, vacation).
  - c. Baylor Plan for weekends.<sup>13</sup>
  - d. Working Parent Option: Part time positions which allow the parent to drop kids at school or day care and leave to pick up (usually 0900 to 1400 hour shifts). Especially helpful on units such as surgical units where the workload is heavier as patients come back from the OR and more help is needed. Less staff requesting this now (average age of nurses is 45).
  - e. Part Time: Work <20 or >20 hours which are state legislated. Benefits are pro-rated depending on the number of hours worked. >20 = 50% benefits, >24 = 60% benefits and 30 = 100%.
  - f. Part Time Plus: Negotiated with the state as most >20 hours usually requires the employer to pay some benefits. If nurses opt to forgo benefits (usually because spouse has them), they can take 15% pay instead, but can't work more than 28 hours per week as after 30 hours the state requires them to have pension benefits.
  - g. Evenings/Nights: Work permanent nights OR evenings and may work some weekend shifts. Combinations of 8 and 12 hour shifts. Get paid 25% more for nights plus 10% more on Saturday and 20% Sunday. If fulfill contract, pay

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<sup>13</sup> Please note: Weekend alternative plans such as the Baylor model are not permissible under the current NBA/HEABC collective agreement in BC.

\$1,500 bonus upon completion (after benefits and taxes, paid as a separate cheque). Withhold 50% of the differential if off sick.

### ***We Care (Nursing Agency)***

- Driven by client requirements and have people on call. Most RN's also employed by hospitals and are working for the agency to get extra hours or to do some specific things.
- Agency offers 4 hour clinic shifts as well as dressings and IV's for any amount of time the nurse wishes to work (mostly day shift). Agency staff also work in hospitals for the hours required, private cases (not many).
- Non-RN staff is usually scheduled by client demand. If the client wishes 24 hour coverage, usually 8 hour shifts with a variety of schedules especially if the client wants a consistent person. If the person is live in, then break arrangements are made for 4 hours at a time.

### ***Providence Yakima Medical Centre and Providence Toppenish***

- Currently have 250 RN's working for Providence Yakima Medical Center and 25 RN's working for Providence Toppenish. In both facilities the RN's are unionized through Washington State Nurses Association.
- Have offered 8, 10 and 12 hour shifts for many years. 8 and 12 hour schedules are cyclic to accommodate the requirement to work every other weekend. To work 12 hour shifts, the nurse is partnered with another nurse to cover the 24 hour period. Where appropriate, nurses are scheduled with Certified Nursing Assistants (CNAs) to work together as a team. Try to schedule RN's to work three 12 hour shifts in a row, so that they have 4 days off in a row. These schedules can be difficult for nurses, as they would like more rest.
- Innovative scheduling is considered any shift other than 8 hours.
- Staff can change schedules as often as needed, but the position must be available for them to apply.
- Currently do not offer opportunities to work full time and then take extended periods of time off. If requested by a staff member, the main consideration would be eligibility for benefits during this time.
- Staffing office uses ANSOS as software for scheduling and tracking nursing staff.

### ***CPM Resource Center in Grand Rapids, Michigan***

- CPM Resource Center is “dedicated to lead and connect individuals and settings across the world in order to create a unique continuous learning network committed to advancing the health and health care of this humanity. CPM is an evolving, systems thinking framework designed to create a healthy, healing culture for recipients and providers of care.” CPM focuses on many things including integrating services, an empowering culture, partnerships, and documentation. CPM has a structure that includes partnership councils at the unit level. One of the things this group does is develop alternate work patterns.
- Overall trends in scheduling:
  - Self-scheduling. e.g. FT/PT 8 hours, FT/PT 12 hours, 1/8 and 1/12.
  - Job sharing weekend positions.

- Nurses currently receiving pensions are allowed to work x amount of hours without their pensions being reduced. This has helped to keep expertise in the system until some nurses are 70 yrs old.
- On- call now being used in ICU and Medical/Surgical areas.
- Informant used to be a Care Director at one of the Spectrum Group of Hospitals in Michigan and spent about 80% of her time assisting Managers with scheduling related issues. Many different types of bonuses are in place, including one for the person who recruits a new staff member. At Spectrum, they used the following scheduling options:
  - Self-scheduling.
  - Job sharing.
  - Weekend alternatives: Used to pay 40 hours to work 3 extended weekend shifts during an earlier nursing shortage – this was later reduced to 36 hours pay. With the recent nursing shortage, there is now a resurgence for the earlier weekend alternative plan. Under this plan, staff can also work extra shifts for regular pay.

***Spectrum Health, Michigan***

- Employs non-unionized 2,083 RNs.
- Use an automated scheduling software called One Staff. Some unit self schedule.
- Options include 8 and 12 hour shifts with some flexibility for 4 and 6 hour shifts for unit based resource staff. Also have a weekend option for those only interested in weekends.
- 60% of staff is part time. Also use traveling nurses but no temporary agency staff. They staff all temporary assignments from their own resource centre.
- Staff is allowed to change shifts/schedules and this is managed at the department level through job posting.
- Managers generally work out schedules and post for staff. They allow staff to change shifts with other staff.



## APPENDIX D: EXTENDED WORK DAY AND COMPRESSED WORK WEEK SCHEDULES

The content listed in this Appendix is an excerpt from the *HEABC/BCNU Shift Rotation Manual: A Guide for Health Care Professionals* (August 1996) and has been reproduced with the permission of BCNU and HEABC. As the Shift Rotation Manual was written in 1996, some sections of the Manual are not consistent with the current collective agreement. Two examples of outdated content are as follows: (1) the BCNU Master Collective Agreement and the BCNU CCERA/Pricare Standard Collective Agreements have been replaced with the Nurses' Bargaining Association Provincial Collective Agreement; and (2) consecutive designated days off for regular part time employees do not apply in the current collective agreement. When utilizing this section of the Resource Guide, please refer to the current collective agreement.

### Introduction of Extended Work Day and Compressed Work Week Schedules (Part II)

#### Change From Existing Shift Rotation to an Extended Work Day

The procedure to be followed by a health care organization for change from an existing shift rotation to a standard extended, two part and/or combined work day schedule is set out below.

#### Step Action

1. The request for a change of hours of work is to emanate from the employees in an identifiable ward/department/unit
2. The work schedule to accommodate the extended work day or compressed work week is prepared and decided upon jointly by the organization and the BCNU members at the local level.
3. The calculations for the proposed schedule are done using the Calculation Sheet for Extended Work Day/Compressed Work Week Schedule. The calculations are to be done to three decimal places.
4. The employees must sign a Release of Overtime for Extended Work Day/Compressed Work Week Schedule. The signature of 90% of all regular full-time and part-time employees (BCNU members) working the schedule must be obtained.
5. Following agreement in principle of the proposed schedule the organization will send to HEABC (with a carbon copy to the BCNU office) a covering letter requesting the preparation of a Memorandum of Agreement by HEABC for the proposed schedule. This covering letter will be accompanied by the following documents:
  - (a) Release of Overtime for Extended Work Day/Compressed Work Week form including the signatures of 90% of all regular full-time and part-time employees working the schedule and the name of a Union contact.

- (b) Calculation Sheet for Extended Work Day/Compressed Work Week Schedule.
  - (c) A copy of the proposed rotations that create the new schedule with the start and finish times of the shifts specified on the rotation(s). All statutory holidays shall be identified and recorded in ink in the nursing staff work schedules on the basis of 7.2 paid hours. Every effort shall be made to spread the statutory holidays off evenly throughout the year (see Extended Work Day Memorandum – Article 39.07 of the BCNU Master Collective Agreement and Article 39.07 of the BCNU CCERA/Pricare Standard Collective Agreements).<sup>14</sup>
6. The criteria for the approval of new Extended Work Day applications is as follows:
- (a) The employee will not be scheduled to work more than four (4) consecutive extended work day shifts.
  - (b) All off-duty days will be consecutive unless requested by the employee and agreed to by the employer.
  - (c) There will be at least 48 hours off between sequences of shifts.
  - (d) The annual imbalance of hours worked is to be brought to the attention of the employee (see calculation sheet). This annual imbalance shall not exceed 12 hours.
  - (e) Two consecutive designated days off per week for regular part-time employees under the HEABC/BCNU Master Collective Agreement must be indicated on the rotation. Regular part-time employees under the CCERA/Pricare Standard Collective Agreements only have their designated days off indicated in accordance with their written request (Article 20.02).<sup>15</sup>
  - (f) Statutory holidays must be incorporated into the work schedule during off duty days.
7. Upon receipt of the request and all documentation from the organization, HEABC will review the application and, if in agreement with the proposed schedule, will prepare a Memorandum of Agreement to vary the terms of the Collective Agreement for the ward/department/unit requesting the extended work day or compressed work week. The Memorandum will be submitted to BCNU for signature.
8. No change on the work schedule may be implemented until the organization has received the approval of both parties.

### Opening of a New Ward/Unit Using the Extended Shift Schedule

The procedure to be followed by the organization for the opening of a new ward/department/unit using the standard shift schedule is set out below. New wards/departments/units are those where no staff is in place.

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<sup>14</sup> The BCNU Master Collective Agreement and the BCNU CCERA/Pricare Standard Collective Agreements have been replaced with the Nurses' Bargaining Association Provincial Collective Agreement.

<sup>15</sup> This is no longer a requirement under the current collective agreement.

**Step Action**

1. The calculations for the proposed schedule are done using the Calculation Sheet for Extended Work Day/Compressed Work Week schedule. The calculations are to be done to three decimal places.
2. The organization will send to HEABC (with a carbon copy to the BCNU office) a covering letter requesting the preparation of a Memorandum of Agreement by HEABC for the proposed schedule.  
This covering letter will be accompanied by the following documents:
  - (a) Calculation Sheet for Extended Work Day/Compressed Work Week Schedule.
  - (b) A copy of the proposed rotations that create the new schedule with the start and finish times of the shifts specified on the rotation(s). All statutory holidays shall be identified and recorded in ink in the nursing staff work schedules on the basis of 7.2 paid hours. Every effort shall be made to spread the statutory holidays off evenly throughout the year (see Extended Work Day Memorandum – Article 39.07 of the BCNU Master Collective Agreement and Article 39.07 of the BCNU CCERA/Pricare Standard Collective Agreements).<sup>16</sup>
  - (c) The employer shall provide a separate document outlining why it requires approval prior to opening the new ward/department/unit and the anticipated opening date.
3. The criteria for the approval of new Extended Work Day applications is as follows:
  - (a) The employee will not be scheduled to work more than four (4) consecutive extended work day shifts.
  - (b) All off-duty days will be consecutive unless requested by the employee and agreed to by the employer.
  - (c) There will be at least 48 hours off between sequences of shifts.
  - (d) The annual imbalance of hours worked is to be brought to the attention of the employee (see calculation sheet). This annual imbalance shall not exceed 12 hours.
  - (e) Two consecutive designated days off per week for regular part-time employees under the HEABC/BCNU Master Collective Agreement must be indicated on the rotation. Regular part-time employees under the CCERA/Pricare Standard Collective Agreements only have their designated days off indicated in accordance with their written request (Article 20.02).<sup>17</sup>
  - (f) Statutory holidays must be incorporated into the work schedule during off duty days.
4. Upon receipt of the request and all documentation from the organization, HEABC will review the application and, if in agreement with the proposed schedule, will prepare a Memorandum of Agreement to vary the terms of the Collective Agreement for the ward/department/unit requesting the extended work day or compressed work week. The memorandum will be submitted to BCNU for signature.
5. The employer upon receiving the necessary approvals from BCNU and HEABC

<sup>16</sup> The BCNU Master Collective Agreement and the BCNU CCERA/Pricare Standard Collective Agreements have been replaced with the Nurses' Bargaining Association Provincial Collective Agreement.

<sup>17</sup> This is no longer a requirement under the current collective agreement.

shall:

- (a) Post the new vacant positions pursuant to the posting provisions of the collective agreement. The posting shall contain the scheduled hours of work.
- (b) Successful applicants shall complete Part V “Release of Overtime for Extended Work Day/Compressed Work Week British Columbia Nurses’ Union.”
- (c) If the signature of 90% of all regular full-time and part-time employees (BCNU members) working the schedule is not obtained within 28 days of opening the new ward/department/unit, the extended work day schedule shall be cancelled.
- (d) Employees in the ward will work in the “cancelled” rotation until either: (1) a new application is submitted pursuant to Part II of this Manual<sup>18</sup> and approval of BCNU and HEABC is achieved; or (b) failing mutual agreement during the next ninety (90) days (or a mutually agreed to time limit), the employer implements a new rotation.

Note: All approvals by BCNU prior to the opening of new wards/departments/units shall be on a “without prejudice” basis.

### Establishing Non-Standard Extended Shift Schedule

The procedure to be followed by the organization for implementing a non-standard work day and compressed work week schedule for:

- (a) Units having special staffing needs or unusual periods of operation which cannot be accommodated using other accepted rotations (e.g., renal units, Central Supply, PAR).
- (b) Units carrying out special procedures requiring additional staff for very specific periods of time (i.e., less than a full extended work day).

#### Step Action

1. In addition to the documentation requested in Part II above (*HEABC/BCNU Shift Rotation Manual: A Guide for Health Care Professionals*), all requests for Non-Standard Rotation Status must be accompanied by a submission outlining the following
  - The reason(s) for requesting non standard rotation status.
  - An explanation of why the ward’s needs cannot be met by a standard rotation.
2. Upon receipt of such a completed submission for Non-standard Rotation Status, the parties will:
  - Advise the organization of acceptance or rejection of the submission.
  - Prepare and process the application as per Part II with the following exceptions:
    - Each special rotation memorandum will be marked “Non-Standard Rotation Status.”
    - Each special rotation memorandum will be accompanied by the conditions of acceptance.
3. Each rotation will be granted on a “without prejudice” basis for the exclusive use of the ward designated.

<sup>18</sup> Refers to the *HEABC/BCNU Shift Rotation Manual: A Guide for Health Care Professionals* (August 1996)

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## Revisions to Existing Extended Work Day and Compressed Work Week Rotations (Part III)

If a ward or unit wishes to change an approved extended work day schedule, the procedure to be followed is:

### Substantive Changes

For revisions to approved extended work day schedules that involve substantive changes (e.g., the length of the extended work day is being varied) the application must be accompanied by:

- Release of Overtime for Extended Work Day/Compressed Work Week from including the signatures of 90% of all regular full-time and part-time employees working the schedule and the name of the Union contract.
- Calculation Sheet for extended Work Day/Compressed Work Week Schedule.
- A copy of the proposed rotations that create the new schedule with the start and finish times of the shifts specified on the rotation(s). All statutory holidays shall be identified and recorded in ink in the nursing staff work schedules on the basis of 7.2 paid hours. Every effort shall be made to spread the statutory holidays off evenly throughout the year (see Extended Work Day Memorandum – Article 39.07 of the BCNU Master Collective Agreement and Article 39.07 of the BCNU CCERA/Pricare Standard Collective Agreements).

No change in the work schedule may be implemented until the organization has received the approval of both parties.

### Non Substantive Changes

For revisions to approved extended work day schedules that do not involve substantive changes (e.g., the addition of staff to an existing schedule), the application must be accompanied by:

- Calculation Sheet for Extended Work Day/Compressed Work Week Schedule.
- A copy of the proposed rotations that create the new schedule with the start and finish times of the shifts specified on the rotations(s). All statutory holidays shall be identified and recorded in ink in the nursing staff work schedules on the basis of 7.2 paid hours. Every effort shall be made to spread the statutory holidays off evenly throughout the year (see Extended Work Day Memorandum – Article 39.07 of the BCNU Master Collective Agreement and Article 39.07 of the BCNU CCERA/Pricare Standard Collective Agreements).

If the HEABC and BCNU approve of the proposed change, the parties will each notify the organization of their approval.

### Changes to Non-Standard Schedules

Any change to an approved non-standard rotation is to be viewed as a new application and the procedure in Part II (*HEABC/BCNU Shift Rotation Manual: A Guide for Health Care Professionals*) is to be followed.



## APPENDIX E: SAMPLES OF TOOLS TO EVALUATE THE IMPACT OF SCHEDULE CHANGES

### Cover Letter (Manager & Registered Nurse)

In order to evaluate the success of a schedule change, we would like to collect information from each unit following the introduction of a new schedule. This survey is one component of the evaluation and we are hoping that you will help by filling it out. Your participation will provide us with information about the impact of this schedule on job satisfaction, burnout, quality and continuity of care, team relationships and the availability of clinical and leadership supports.

Participation in this survey is strictly voluntary. Your consent is given when you return the survey. The survey takes about 15 minutes to complete and contains no identifying information.

Please return your completed survey in the enclosed self-addressed stamped envelope. The data from the survey will be reported by group findings only (with no identifying information from any of the participants) and summarized for each participating unit/area. The report will be submitted to \_\_\_\_\_ and will be available to participating nurses thereafter.

If you have questions or concerns about the survey questionnaire, please feel free to discuss with \_\_\_\_\_.

We realize that many nurses work on more than one unit or at more than one hospital. When you answer the questions on this survey, please do so **as per the unit that has adopted or is planning to adopt a new schedule.**

Thank you for your feedback.

## Manager Survey

Agency: \_\_\_\_\_

Site: \_\_\_\_\_

Unit: \_\_\_\_\_

Date: (day) \_\_\_\_\_ (month) \_\_\_\_\_ (year) \_\_\_\_\_

### A. Perceptions about the New Schedule

1. What is your ***overall level of satisfaction with the new schedule/schedule change that was implemented on your unit?***

|                          |                          |                                      |                          |                          |
|--------------------------|--------------------------|--------------------------------------|--------------------------|--------------------------|
| Very<br>dissatisfied     | Somewhat<br>dissatisfied | Neither dissatisfied<br>or satisfied | Somewhat<br>satisfied    | Very satisfied           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>             | <input type="checkbox"/> | <input type="checkbox"/> |

2. How would you describe your ***level of satisfaction with your unit's new schedule compared with the previous schedule?***

|                          |                          |                               |                          |                          |
|--------------------------|--------------------------|-------------------------------|--------------------------|--------------------------|
| Much less<br>satisfied   | Less satisfied           | Same level of<br>satisfaction | More satisfied           | Much more satisfied      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> | <input type="checkbox"/> |

3. Rate the impact that the new schedule/change in schedule has had on your role.

|                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Very negative            | Negative<br>impact       | No impact                | Positive<br>impact       | Very positive<br>impact  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

4. Rate the impact that the new schedule/change in schedule has had on ***your time commitment to scheduling?***

|                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Very negative            | Negative<br>impact       | No impact                | Positive<br>impact       | Very positive<br>impact  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**5. Rate the impact that the new schedule/change in schedule has had on staff on your unit?**

|   | Very negative impact     | Negative impact          | No impact                | Positive impact          | Very positive impact     |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Overall attitude towards work   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to access their Supervisor/ Manager   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to access clinical resources/ supports (e.g., nurse clinician, nurse educator, senior nurses) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to attend inservices or continuing education sessions   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to pursue additional education or other desired pursuits                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to stay informed about changes/new information at work  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to control their own schedules  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Level of energy, at work  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Level of energy, away from work   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Requests for shift changes  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**6. Rate the impact that the new schedule/change in schedule has had on your unit?**

|  | Very negative impact     | Negative impact          | No impact                | Positive impact          | Very positive impact     |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Working relationships amongst nursing colleagues on unit   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Working relationships between nursing and other disciplines  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Availability of up-to-date nursing care plans for all patients/residents   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Patient care assignments that foster continuity of care – i.e., the same nurse cares for the patient/resident from one day to the next | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Overall quality of care (e.g., medication errors, nosocomial infections, complaints, patient falls)                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

7. From your perspective *what are the positive and negative aspects of the new schedule/change in schedule on this unit?*

| Negative Impact | Positive Impact |
|-----------------|-----------------|
|                 |                 |
|                 |                 |
|                 |                 |
|                 |                 |

**B. Impact of Schedule on Quantative Indicators**

8. Please complete the following:

|  | Pre New Schedule Period <sup>1</sup> | New Schedule Period |
|--|--------------------------------------|---------------------|
| # sick hours to total worked hours     |                                      |                     |
| # WCB hours to total worked hours      |                                      |                     |
| # overtime hours to total worked hours |                                      |                     |
| # of vacancies <sup>2</sup>            |                                      |                     |

<sup>1</sup> Use same time period as that of the new schedule period, except use the previous year (for example, if the innovative schedule pilot period was September 03 – March 04, use September 02 – March 03 as the “pre new schedule period.”)  
<sup>2</sup> Complete if the information is readily accessible.

**9. Other Comments:**

You may have something that you would like to mention that we didn’t address in the survey. If so, please use the space provided below.

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**THANK YOU FOR TAKING THE TIME TO COMPLETE AND RETURN THIS SURVEY!**

## Registered Nurse Survey

### A. Demographic/Practice Information

Agency: \_\_\_\_\_

Site: \_\_\_\_\_

Unit: \_\_\_\_\_

Date: (day) \_\_\_\_\_ (month) \_\_\_\_\_ (year) \_\_\_\_\_

**1. What is the *status of your position on this unit?***

Regular Full Time       Temporary Full Time       Casual

Regular Part Time       Casual Part Time

Other, please specify \_\_\_\_\_

**2. How long have you worked on *this unit?***

<1 year       1 – 2 years       2 – 5 years       >5 years

**3. How many years have you worked *in nursing since graduation?***

<1 year       1 – 2 years       2 – 5 years       >5 years

**4. At *how many sites* do you hold positions (full time, part time or casual)?**

1 site       2 sites       3 or more sites

**5. Which of the following household responsibilities apply to you that *may influence your preferred nursing schedule?* (Check off all that apply)**

Number of children <17 years

0       1 – 3       4 or more

1 or more seniors or disabled adults living with you that require your attention

Other, please specify

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. If you have children, seniors or disabled adults living with you, *how much does this influence the type of schedule you wish to work?*

- A great deal     A fair amount     Somewhat     A little     None

7. Are you currently enrolled in a course(s) to pursue higher levels or alternative types of education?

- Yes                       No

If yes, are you ...     Full time                       Part-time

8. If you are enrolled in a course(s) to pursue higher levels or alternative types of education, *how much does this influence the type of schedule you wish to work?*

- A great deal     A fair amount     Somewhat     A little     None

9. How far is your commute from home to this site?

- <10 km             10 – 20 km     21 – 30 km     31 – 40 km             > 40 km

10. Please indicate your *age*:

- 20 - 29             30-39             40-49             50-59             60+

11. Did your individual schedule change as a result of the new rotation/change in rotation on the unit?

- Yes                       No

If so, describe how your previous schedule was different from new or changed schedule?

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**12. Regardless of whether your individual schedule changed, what impact do you perceive the new unit rotation/change in unit rotation has had on *your unit*?**

|  | Very Negative Impact     | Negative Impact          | No Impact                | Positive Impact          | Very Positive Impact     |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Working relationships among nursing colleagues on unit   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Working relationships between nursing and other disciplines  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Availability of time to plan patient/resident care in a thoughtful way   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Patient care assignments that foster continuity of care – i.e., the same nurse cares for the patient/resident from one day to the next | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Overall quality of care (e.g., medication errors, nosocomial infections, complaints, patient falls)                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**13. From your perspective what are the positive and negative aspects of the new schedule/change in schedule on this unit?**

| Negative Impact | Positive Impact |
|-----------------|-----------------|
|                 |                 |
|                 |                 |
|                 |                 |
|                 |                 |

***If your schedule changed, please complete the remainder of this survey; if not, thank you for taking the time to complete the first part of this survey.***

**B. Schedule Change Information**

**14. Prior to implementing the new schedule/change in schedule, *what was the usual length of your shift when working on this unit?***

- 8 hours             12 hours             Combination of 8 & 12 hour shifts

Other, please specify \_\_\_\_\_

**15. Since implementing the new schedule/change in schedule, *what is the usual length of your shift when working on this unit?***

- 8 hours             12 hours             Combination of 8 & 12 hour shifts

Not applicable     Other, please specify \_\_\_\_\_

**16. Which of the following apply to your new or changed schedule? (check all that apply)**

Permanent evening shifts

Permanent night shifts

Permanent weekend shifts

Varied length of shift

Varied start and stop times

Innovative job sharing where > 1 person share > 1 line

Varied hours throughout the year (e.g., full time x 2 months, off x 2 months)

Consistent days off

Weekend alternative plans

Self scheduling

Other, please list

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Not applicable

**C. Perceptions about New Schedule**

**17. What is your overall level of satisfaction with your new schedule/change in schedule?**

|                          |                          |                                      |                          |                          |
|--------------------------|--------------------------|--------------------------------------|--------------------------|--------------------------|
| Very<br>dissatisfied     | Somewhat<br>dissatisfied | Neither dissatisfied<br>or satisfied | Somewhat<br>satisfied    | Very satisfied           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>             | <input type="checkbox"/> | <input type="checkbox"/> |

**18. Compared with your previous schedule, how would you rate your level of satisfaction with your new or changed schedule?**

|                          |                          |                               |                          |                          |
|--------------------------|--------------------------|-------------------------------|--------------------------|--------------------------|
| Much less<br>satisfied   | Less satisfied           | Same level of<br>satisfaction | More satisfied           | Much more satisfied      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> | <input type="checkbox"/> |

**19. Rate the impact that the new schedule/change in schedule has had on you?**

|   | Very<br>Negative         | Negative<br>Impact       | No Impact                | Positive<br>Impact       | Very Positive<br>Impact  |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Overall attitude towards work   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to access your Supervisor/<br>Manager   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to access clinical resources/<br>supports (e.g., nurse clinician, nurse<br>educator, senior nurses) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to attend inservices or<br>continuing education sessions  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to pursue additional education<br>or other desired pursuits   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to stay informed about<br>changes/new information at work   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to control own schedule   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Level of energy, at work and away<br>from work  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Request for shift changes   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**20. Other Comments:**

You may have something that you would like to mention that we didn't address in the survey. If so, please use the space provided below.

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**THANK YOU FOR TAKING THE TIME TO COMPLETE AND RETURN THIS SURVEY!**



## **APPENDIX F**

### **Samples of Schedules with Different Mixes and Numbers of Staff**



## APPENDIX F: SAMPLES OF SCHEDULES WITH DIFFERENT MIXES AND NUMBERS OF STAFF

### Standard Schedules

| Sample | Work Day | Shift Length | Staffing |   |   |   |   |
|--------|----------|--------------|----------|---|---|---|---|
|        |          |              | D        | d | e | N | n |
| 1      | Standard | 7.5          |          | 6 | 4 |   | 3 |
| 2      | Standard | 7.5          |          | 4 | 3 |   | 1 |
| 3      | Extended | 11           | 4        |   |   | 4 |   |
| 4      | Extended | 11           | 4        |   |   | 2 |   |
| 5      | Extended | 11           | 3        |   |   | 2 |   |
| 6      | Two Part | 11/7.5       | 3        | 1 | 1 | 3 | 1 |
| 7      | Combined | 11/7.5       | 2        | 2 | 2 | 2 | 1 |

### Innovative Schedules

| Sample | Work Day | Shift Length   | Innovation   | Staffing |                          |                          |   |   |
|--------|----------|----------------|--|----------|--------------------------|--------------------------|---|---|
|        |          |                |  | D        | d                        | e                        | N | n |
| 8      | Standard | 7.5            | <ul style="list-style-type: none"> <li>Consistent days off</li> <li>Permanent shifts</li> </ul>                                      |          | 5                        | 4                        |   | 3 |
| 9      | Standard | 11.25/9.5      | <ul style="list-style-type: none"> <li>Consistent days off</li> <li>Permanent shifts</li> <li>Variations in shift lengths</li> </ul> | 5        | 1<br>(D <sup>9.5</sup> ) |                          | 5 |   |
| 10     | Extended | 11             | <ul style="list-style-type: none"> <li>Innovative job sharing</li> </ul>   | 5        | 1                        | 1                        | 5 | 1 |
| 11     | Standard | 7.5            | <ul style="list-style-type: none"> <li>Consistent days off</li> <li>Variations in start times</li> </ul>                             | 3        | 1                        | 3                        |   | 3 |
| 12     | Extended | 11             | <ul style="list-style-type: none"> <li>Consistent days off</li> <li>Permanent shifts</li> </ul>                                      | 6        |                          |                          | 6 |   |
| 13     | Combined | 11/9.5/<br>5.5 | <ul style="list-style-type: none"> <li>Variations in shift length</li> </ul>   | 3        | 1<br>D <sup>(9.5)</sup>  | 1<br>(e <sup>5.5</sup> ) | 3 |   |

### Self Scheduling

Samples of Unit Guidelines for Self Scheduling

# STANDARD SCHEDULES

## Sample #1

| Work Day | Shift Length | Staffing |   |   |   |   |
|----------|--------------|----------|---|---|---|---|
|          |              | D        | d | e | N | n |
| Standard | 7.5          |          | 6 | 4 |   | 3 |

|                             | Schedule |             |        |             |
|-----------------------------|----------|-------------|--------|-------------|
|                             | FT d/e   | PT d/e      | FT d/n | PT d/n      |
| Schedule(s) length          | 18 wks   | 8 wks       | 14 wks | 6 wks       |
| # Full time/part time lines | 9        | 4 x .52 FTE | 7      | 3 x .58 FTE |
| Hours per year (excl stats) | 1,805    | 930         | 1,790  | 1,044       |

|                                       | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|---------------------------------------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Evenings, 7.5 Hour Shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  | e   | e   | e   | e   | e    | e   |       |     | d   | d   | d   | e    | e   |       |
| FT 2                                  |     | d   | d   | d   | d    | d   | d     |     |     |     | d   | d    | d   | e     |
| FT 3                                  | e   | e   | e   |     |      | e   | e     | e   | e   | e   | e   |      |     | d     |
| FT 4                                  | d   |     |     | st  | d    | d   | d     | d   | d   |     |     | e    | e   | e     |
| FT 5                                  | st  |     |     | e   | e    |     |       | e   | e   | e   | e   | e    | e   |       |
| FT 6                                  |     | d   | d   | d   | e    | e   | e     |     |     | d   | d   | d    | d   | d     |
| FT 7                                  | d   |     |     | st  | d    | d   | e     | e   |     |     |     |      | e   | e     |
| FT 8                                  | e   | e   | e   | e   |      |     | d     | d   |     |     | st  | d    | d   | d     |
| FT 9                                  | d   | d   | d   |     |      | e   | e     | e   |     |     | e   | e    |     |       |
| PT 1                                  | e   |     |     | st  |      |     |       |     | e   | e   | e   |      |     |       |
| PT 2                                  | d   |     |     |     |      |     |       | d   | d   | d   |     |      |     |       |
| PT 3                                  |     | e   | e   |     |      | d   |       | d   | d   | d   | st  |      |     |       |
| PT 4                                  |     |     |     | e   | e    |     |       |     | e   | e   |     |      |     | e     |
| <b>Days/Nights, 7.5 Hour Shifts</b>   |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  |     | d   | d   | d   | d    | d   | st    |     |     |     | n   | n    | n   | n     |
| FT 2                                  | n   |     |     | d   | d    | d   | d     |     |     |     |     | n    | n   | n     |
| FT 3                                  | n   | n   | n   | st  |      |     | d     | d   | d   | d   | d   | d    |     |       |
| FT 4                                  | n   | n   | n   | n   | n    | n   |       |     | d   | d   | d   | d    | d   | n     |
| FT 5                                  | st  |     |     | n   | n    | n   | n     | n   |     |     |     | d    | d   | d     |
| FT 6                                  | d   |     |     |     | n    | n   | n     | n   | n   | n   |     |      | d   | d     |
| FT 7                                  | d   |     |     | d   | d    |     |       | d   | n   | n   | n   | n    | n   |       |
| PT 1                                  |     | d   | d   |     |      |     | n     | n   | n   | n   | n   |      |     |       |
| PT 2                                  |     | d   | d   | d   | st   |     |       |     |     |     |     |      |     | d     |
| PT 3                                  |     | n   | n   | n   |      |     | d     |     |     |     | d   | st   |     |       |
| <b>Count</b>                          |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| d                                     | 6   | 6   | 6   | 6   | 6    | 6   | 6     | 6   | 6   | 6   | 6   | 6    | 6   | 6     |
| e                                     | 4   | 4   | 4   | 4   | 4    | 4   | 4     | 4   | 4   | 4   | 4   | 4    | 4   | 4     |
| n                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |

- D=0700-1500 hours; e = 1500-2300 hours; n=2300-0700 hours
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #2

| Work Day | Shift Length | Staffing |   |   |   |   |
|----------|--------------|----------|---|---|---|---|
|          |              | D        | d | e | N | n |
| Standard | 7.5 hours    |          | 4 | 3 |   | 1 |

|                             | Schedule |        |                    |                 |
|-----------------------------|----------|--------|--------------------|-----------------|
|                             | PT d/n   | FT d/e | PT d/e (lines 1-3) | PT d/e (line 4) |
| Schedule(s) length          | 12 wks   | 24 wks | 12 wks             | 4 wks           |
| # Full time/part time lines | 3        | 6      | 3x.83              | 1 x .71 FTE     |
| Hours per year (excl stats) | 1,794    | 1,794  | 1,501              | 1,272           |

|                                       | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|---------------------------------------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, 7.5 Hour Shifts</b>   |     |     |     |     |      |     |       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  |     |     |     | d   | d    | d   | d     | d   | st  |     |     | n    | n   | n     | n   | n   | n   |     |      | n   | n     | n   | n   | n   | n   |      |     |       |
| FT 2                                  | d   | d   | d   | n   | n    |     |       |     | d   | d   | d   | d    | d   | st    |     |     |     | d   | d    | d   | d     | d   |     |     | n   | n    | n   |       |
| FT 3                                  | n   | n   | n   |     |      | n   | n     | n   | n   | n   | n   |      |     |       | d   | d   | d   | n   | n    | st  |       |     | d   | d   | d   | d    |     |       |
| <b>Days/Evenings, 7.5 Hour Shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  | st  |     |     | d   | d    | d   | d     | d   |     |     |     | e    | e   | e     | e   | e   | e   |     |      |     | e     | e   | e   | e   | e   |      |     |       |
| FT 2                                  | d   | d   | d   | e   | e    |     |       |     | d   | d   | d   | d    | d   | d     |     |     | st  | d   | d    | d   | d     | d   |     |     | e   | e    | e   |       |
| FT 3                                  | e   | e   | e   |     |      |     | e     | e   | e   | e   | e   |      |     |       | d   | d   | d   | e   | e    | st  |       |     | d   | d   | d   | d    | d   |       |
| FT 4                                  | st  |     |     | d   | d    | d   | d     | d   |     |     |     | e    | e   | e     | e   | e   | e   |     |      | e   | e     | e   | e   | e   |     |      |     |       |
| FT 5                                  | d   | d   | d   | e   | e    |     |       |     | d   | d   | d   | d    | d   | d     |     |     | st  | d   | d    | d   | d     | d   |     |     | e   | e    | e   |       |
| FT 6                                  | e   | e   | e   |     |      | e   | e     | e   | e   | e   | e   |      |     |       | d   | d   | d   | e   | e    | st  |       |     | d   | d   | d   | d    | d   |       |
| PT 1                                  |     |     | st  | d   | d    | d   | d     | d   |     |     |     | e    | e   | e     | e   | e   |     |     |      | e   | e     | e   | e   | e   |     |      |     |       |
| PT 2                                  | d   | d   | d   |     |      | e   | e     | e   | st  |     |     | d    | d   | d     |     |     | e   | e   | e    | e   |       |     |     | d   | d   |      |     |       |
| PT 3                                  | e   | e   | e   |     |      |     |       |     | d   | d   | d   |      |     | d     | d   |     |     |     | st   | d   | d     | d   | d   | d   |     |      | d   | d     |
| PT 4                                  |     |     |     | e   | e    | e   |       |     |     | e   | e   | e    |     |       |     |     | d   | d   | d    | d   | st    |     |     |     |     | e    | e   | e     |
| <b>Count</b>                          |     |     |     |     |      |     |       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| d                                     | 4   | 4   | 4   | 4   | 4    | 4   | 4     | 4   | 4   | 4   | 4   | 4    | 4   | 4     | 4   | 4   | 4   | 4   | 4    | 4   | 4     | 4   | 4   | 4   | 4   | 4    | 4   | 4     |
| e                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |
| n                                     | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     |

- d=0700-1500 hours; e = 1500-2300 hours; n=2300-0700 hours
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #3

| Work Day | Shift Length | Staffing |   |   |   |   |
|----------|--------------|----------|---|---|---|---|
|          |              | D        | d | e | N | n |
| Extended | 11           | 4        |   |   | 4 |   |

|                             | Schedule |                          |
|-----------------------------|----------|--------------------------|
|                             | FT D/N   | PT D/N                   |
| Schedule(s) length          | 18 wks   | 18 wks                   |
| # Full time/part time lines | 16 FT    | 4 x .5 FTE (see * below) |
| Hours per year (excl stats) | 1,797    | 899                      |

|                                    | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|------------------------------------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, 11 Hour Shifts</b> |     |     |     |     |      |     |       |
| FT 1                               | D   | D   | N   | N   |      |     | st    |
| FT 2                               |     |     | D   | D   | N    | N   |       |
| FT 3                               |     |     |     |     | D    | D   | N     |
| FT 4                               | N   |     |     |     |      |     | D     |
| FT 5                               | D   | N   | N   |     |      |     |       |
| FT 6                               |     | D   | D   | N   | N    |     |       |
| FT 7                               |     |     |     | D   | D    | N   | N     |
| FT 8                               |     |     |     | st  |      | D   | D     |
| FT 9                               | N   | N   |     |     |      |     |       |
| FT 10                              | D   | D   | N   | N   |      |     |       |
| FT 11                              |     |     | D   | D   | N    | N   |       |
| FT 12                              |     |     |     |     | D    | D   | N     |
| FT 13                              | N   |     |     |     | st   |     | D     |
| FT 14                              | D   | N   | N   |     |      |     |       |
| FT 15                              |     | D   | D   | N   | N    |     |       |
| FT 16                              |     |     |     | D   | D    | N   | N     |
| FT 17*                             |     |     |     |     |      | D   | D     |
| FT 18*                             | N   | N   |     | st  | D/-  |     |       |
| <b>Count</b>                       |     |     |     |     |      |     |       |
| D                                  | 4   | 4   | 4   | 4   | 4/5  | 4   | 4     |
| N                                  | 4   | 4   | 4   | 4   | 4    | 4   | 4     |

- \* = these 2 lines are job sharing lines (2x.5 FTE's), whereby the shifts for each line are split amongst two employees. Once allocated, the lines are generally displayed on the schedule as lines 17A and 17B and lines 18A and 18B.
- D=0700-1900 hours; N=1900-0700 hours
- D/- (line 18) is worked once per year only; all remaining shifts marked "D/-" will be considered days off.
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked "st" will be considered days off.

Sample #4

| Work Day | Shift Length | Staffing |   |   |   |   |
|----------|--------------|----------|---|---|---|---|
|          |              | D        | d | e | N | n |
| Extended | 11           | 4        |   |   | 2 |   |

|                             | Schedule |             |
|-----------------------------|----------|-------------|
|                             | FT D/N   | PT D/N      |
| Schedule(s) length          | 24 wks   | 4 wks       |
| # Full time/part time lines | 12       | 2 x .72 FTE |
| Hours per year (excl stats) | 1,794    | 1,291       |

|                                    | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|------------------------------------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, 11 Hour Shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                               |     |     |     | st  | D    | D   | N     | N   |     |     |     |      | D   | D     |
| FT 2                               | N   | N   |     |     |      |     | D     | D   | N   | N   |     |      |     |       |
| FT 3                               | D   | D   | N   | N   |      |     |       |     |     |     | st  | D    | D   | N     |
| FT 4                               | N   |     |     |     |      | D   | D     | D   | N   |     |     |      |     | D     |
| FT 5                               | D   | N   | N   |     |      |     |       | D   | D   | N   | N   |      |     |       |
| FT 6                               |     | D   | D   | N   | N    |     |       |     |     | D   | D   | N    | N   |       |
| FT 7                               |     |     |     | D   | D    | N   | N     |     |     |     |     | D    | D   | st    |
| FT 8                               |     |     |     |     |      | D   | D     | N   |     |     |     |      |     | D     |
| FT 9                               | D   | D   | st  |     |      |     | D     | D   | D   | D   |     |      |     |       |
| FT 10                              | D   | D   | D   |     |      |     |       |     |     | st  | D   | D    |     |       |
| FT 11                              |     |     | D   | D   | D    | N   |       |     |     |     | D   | N    | st  |       |
| FT 12                              |     |     | D   | D   | D    | D   |       |     |     |     | D   | D    | N   | N     |
| PT 1                               | st  |     |     |     |      |     |       |     | D   | D   | N   |      |     |       |
| PT 2                               |     |     |     | D   | N    |     |       |     | D   | D   |     |      | D   | D     |
| <b>Count</b>                       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| D                                  | 4   | 4   | 4   | 4   | 4    | 4   | 4     | 4   | 4   | 4   | 4   | 4    | 4   | 4     |
| N                                  | 2   | 2   | 2   | 2   | 2    | 2   | 2     | 2   | 2   | 2   | 2   | 2    | 2   | 2     |

- D=0700-1900 hours; N=1900-0700 hours
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #5

| Work Day | Shift Length | Staffing |   |   |   |   |
|----------|--------------|----------|---|---|---|---|
|          |              | D        | d | e | N | n |
| Extended | 11           | 3        |   |   | 2 |   |

|                             | Schedule |             |
|-----------------------------|----------|-------------|
|                             | FT D/N   | PT D/N      |
| Schedule(s) length          | 20 wks   | 4 wks       |
| # Full time/part time lines | 10       | 2 x .56 FTE |
| Hours per year (excl stats) | 1,809    | 1,005       |

|                                    | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|------------------------------------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, 11 Hour Shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                               |     | D   | D   | N   | N    | st  |       |     |     |     | D   | D    | D   | N     |
| FT 2                               |     |     |     |     | D    | D   | D     | N   |     |     |     |      |     | D     |
| FT 3                               | D   | N   | st  |     |      |     |       | D   | D   | N   | N   |      |     |       |
| FT 4                               |     | D   | D   | D   | st   |     |       |     |     | D   | D   | N    | N   |       |
| FT 5                               |     |     |     | D   | D    | N   | N     |     |     |     |     | D    | D   | D     |
| FT 6                               |     |     |     |     |      | D   | D     | N   | N   |     |     |      |     |       |
| FT 7                               | D   | D   | N   | N   | st   |     |       |     |     | D   | D   | N    | N   |       |
| FT 8                               | st  |     |     |     | D    | N   | N     |     |     |     |     | D    | D   | N     |
| FT 9                               | N   |     |     |     |      | D   | D     | D   | N   |     |     |      |     |       |
| FT 10                              | D   | N   | N   |     |      |     |       | D   | D   | N   | N   |      |     |       |
| PT 1                               |     |     | D   | D   | N    |     |       |     |     |     |     |      |     | D     |
| PT 2                               | N   | st  |     |     |      |     |       |     | D   | D   |     |      |     |       |
| <b>Count</b>                       |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| D                                  | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |
| N                                  | 2   | 2   | 2   | 2   | 2    | 2   | 2     | 2   | 2   | 2   | 2   | 2    | 2   | 2     |

- D=0700-1900 hours; N=1900-0700 hours; d=0700-1500 hours; e=1500-2300 hours; n=2300-0700 hours
- Stat holidays for FT RNs must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #6

| Work Day | Shift Length           | Staffing |   |   |   |   |
|----------|------------------------|----------|---|---|---|---|
|          |                        | D        | d | e | N | n |
| Two part | 11 D/N<br>7.5 d/e; d/n | 3        | 1 | 1 | 3 | 1 |

|                             | Schedule |             |             |            |
|-----------------------------|----------|-------------|-------------|------------|
|                             | FT D/N   | PT D/N      | PT d/e      | PT d/n     |
| Schedule(s) length          | 20 wks   | 8 wks       | 6 wks       | 6 wks      |
| # Full time/part time lines | 10       | 4 x .84 FTE | 3 x .73 FTE | 3 x .8 FTE |
| Hours per year (excl stats) | 1,809    | 1,507       | 1,305       | 1,435      |

|                                       | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|---------------------------------------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, 11 Hour Shifts</b>    |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  |     |     |     | D   | D    | N   |       |     |     | D   | N   | N    |     |       |
| FT 2                                  |     |     | D   | N   | N    | st  |       |     | D   | D   | N   |      |     |       |
| FT 3                                  | D   | D   | D   | N   |      |     |       |     |     |     | D   | D    | D   | st    |
| FT 4                                  |     |     |     | D   | D    | D   |       |     | D   | D   | N   | N    |     |       |
| FT 5                                  |     | D   | D   | N   | N    |     |       |     |     |     |     |      | D   | D     |
| FT 6                                  |     |     |     |     |      |     | D     | D   | D   | N   |     |      |     | D     |
| FT 7                                  | D   | D   | N   |     |      | D   | D     | N   | st  |     |     |      | D   | N     |
| FT 8                                  |     |     |     |     |      |     | st    | N   | N   | N   |     |      |     |       |
| FT 9                                  | st  | N   | N   |     |      | D   | N     |     |     |     | D   | N    | N   |       |
| FT 10                                 |     |     |     | D   | N    | N   | N     |     |     |     | D   | D    | N   | N     |
| <b>Days/Evenings, 7.5 Hour Shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| PT 1                                  | e   | e   | e   |     |      | d   | d     | e   | e   | e   |     |      | d   | d     |
| PT 2                                  | st  |     |     |     |      | e   | e     |     |     |     |     |      | e   | e     |
| PT 3                                  |     |     | d   | e   | e    |     |       |     | st  | d   | e   | e    |     |       |
| <b>Days/Nights, 7.5 Hour Shifts</b>   |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| PT 1                                  | d   | d   | n   | n   | n    |     |       | d   | d   | n   | n   | n    |     |       |
| PT 2                                  |     |     |     | d   | d    | n   | n     | st  |     |     | d   | d    | n   | n     |
| PT 3                                  | n   | n   |     |     |      |     |       | n   | n   | st  |     |      |     |       |
| <b>Count</b>                          |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| D                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |
| N                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |
| d                                     | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     |
| e                                     | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     |
| n                                     | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     |

- D=0700-1900 hours; N=1900-0700 hours; d=0700-1500 hours; e=1500-2300 hours; n=2300-0700 hours
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #7

| Work Day | Shift Length | Staffing |   |   |   |   |
|----------|--------------|----------|---|---|---|---|
|          |              | D        | d | e | N | n |
| Combined | 11/7.5       | 2        | 2 | 2 | 2 | 1 |

|                             | Schedule |             |
|-----------------------------|----------|-------------|
|                             | FT D/N   | PT D/N      |
| Schedule(s) length          | 24 wks   | 12 wks      |
| # Full time/part time lines | 12       | 6 x .76 FTE |
| Hours per year (excl stats) | 1,797    | 1,370       |

|   | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|---|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, Combined 7.5 &amp; 11 Hour Shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1  |     |     |     | D   | D    | d   | D     |     |     | D   | N   | st   |     |       |
| FT 2  |     |     | D   | N   |      |     |       | D   | D   | d   | N   |      |     | st    |
| FT 3  | D   | D   | d   | N   |      |     | st    | n   | n   | n   | n   | n    | n   |       |
| FT 4  |     | d   | n   | n   | n    | n   |       |     |     | D   | D   | N    |     |       |
| FT 5  |     | D   | D   | D   | N    |     |       |     |     |     | d   | d    | N   | N     |
| FT 6  |     |     |     | d   | d    | N   | N     |     |     |     |     |      | D   | D     |
| FT 7  | d   |     |     |     |      | D   | D     | N   | N   |     |     |      |     |       |
| FT 8  | N   | N   |     |     |      |     |       | d   | d   | N   |     |      |     | n     |
| FT 9  | n   | n   | N   |     |      |     | n     | N   | N   | N   | st  |      |     |       |
| FT 10   | N   | N   | N   | st  |      |     |       | D   | D   |     |     | D    | D   | d     |
| FT 11   | D   |     |     |     | D    | D   | d     | st  |     |     |     | N    | N   | N     |
| FT 12   |     |     |     |     | N    | N   | N     |     |     |     | D   | D    | d   | D     |
| PT 1  |     |     | e   | e   | e    | st  |       |     |     | e   | e   | e    |     |       |
| PT 2  |     |     |     | e   | e    |     |       | e   | e   | st  |     | d    | e   |       |
| PT 3  | d   | e   |     |     | d    | e   |       |     | d   | d   | d   |      |     | d     |
| PT 4  |     | d   | d   | d   |      |     | d     | d   | e   | e   |     |      | d   | e     |
| PT 5  | e   |     |     |     |      | d   | e     | e   |     |     |     |      | e   | e     |
| PT 6  | e   | e   | e   |     |      | e   | e     |     |     |     | e   | e    | st  |       |
| <b>Count</b>  |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| D   | 2   | 2   | 2   | 2   | 2    | 2   | 2     | 2   | 2   | 2   | 2   | 2    | 2   | 2     |
| N   | 2   | 2   | 2   | 2   | 2    | 2   | 2     | 2   | 2   | 2   | 2   | 2    | 2   | 2     |
| d   | 2   | 2   | 2   | 2   | 2    | 2   | 2     | 2   | 2   | 2   | 2   | 2    | 2   | 2     |
| e   | 2   | 2   | 2   | 2   | 2    | 2   | 2     | 2   | 2   | 2   | 2   | 2    | 2   | 2     |
| n   | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     |

- D=0700-1900 hours; N=1900-0700 hours; d=0700-1500 hours; e=1500-2300 hours; n=2300-0700 hours
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

# INNOVATIVE SCHEDULES

## Sample #8

| Work Day | Shift Length | Innovation  | Staffing |   |   |   |   |
|----------|--------------|---|----------|---|---|---|---|
|          |              |   | D        | d | e | N | n |
| Standard | 7.5          | <ul style="list-style-type: none"> <li>Consistent days off (d/n, PT 1-3)</li> <li>Permanent shifts (d/n, PT 1-3)</li> </ul> |          | 5 | 4 |   | 3 |

|                             | Schedule |         |        |                 |                 |                 |
|-----------------------------|----------|---------|--------|-----------------|-----------------|-----------------|
|                             | FT d/e   | PT d/e  | FT d/n | PT d/n (line 1) | PT d/n (line 2) | PT d/n (line 3) |
| Schedule(s) length          | 18 wks   | 6 wks   | 12 wks | 2 wks           | 2 wks           | 2 wks           |
| # FT/PT lines               | 9        | 3 x .40 | 6      | 1 x .87         | 1 x .65         | 1 x .54         |
| Hours per year (excl stats) | 1,805    | 718     | 1,794  | 1,566           | 1,174           | 979             |

|                                       | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|---------------------------------------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Evenings, 7.5 Hour Shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  | e   | e   | e   | e   | e    | e   |       |     | d   | d   | d   | e    | e   | e     |
| FT 2                                  |     |     | d   | d   | d    | d   | d     | d   |     |     |     |      | d   | e     |
| FT 3                                  | e   | e   | e   | e   |      |     | e     | e   | e   | e   | e   |      |     | d     |
| FT 4                                  | e   |     |     | st  | d    | d   | e     | e   | e   |     |     | e    | e   | e     |
| FT 5                                  | st  |     |     | e   | e    |     |       | e   | e   | e   | e   | e    | e   |       |
| FT 6                                  |     | d   | d   | d   | e    | e   | e     |     |     |     | d   | d    | d   | d     |
| FT 7                                  | d   |     |     | st  | d    | d   | d     | d   | d   | d   |     |      | e   | e     |
| FT 8                                  | e   | e   | e   | e   |      |     | d     | e   | e   |     | st  | d    | d   | d     |
| FT 9                                  | d   | d   |     |     | e    | e   | e     |     |     |     | e   | e    |     |       |
| PT 1                                  | d   | d   | d   |     |      |     |       |     | d   | e   |     |      |     |       |
| PT 2                                  |     | e   | e   |     |      |     |       |     |     | e   | e   | st   |     |       |
| PT 3                                  |     |     |     | d   |      | e   | st    |     |     |     |     |      |     |       |
| <b>Days/Nights, 7.5 Hour Shifts</b>   |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  |     | d   | d   | d   | d    | d   |       |     | st  | d   | d   | d    | d   | d     |
| FT 2                                  | n   |     |     | d   | d    | d   | d     | d   |     |     |     | n    | n   | n     |
| FT 3                                  | n   | n   | n   | st  |      |     | d     | d   | n   | n   | n   | n    |     |       |
| FT 4                                  | n   | n   | n   | n   | n    | n   |       |     | d   | d   | d   | d    | n   | n     |
| FT 5                                  | st  |     |     | n   | n    | n   | n     | n   |     |     | d   | d    | d   | d     |
| FT 6                                  | d   |     |     |     |      |     | n     | n   | n   | n   | n   |      |     |       |
| PT 1                                  |     |     |     | n   | n    | n   | n     |     |     |     | n   | n    | n   | n     |
| PT 2*                                 | d   | d   | d   |     |      |     | st    | d   | d   | d   |     |      |     |       |
| PT 3*                                 |     | n   | n   | st  |      |     |       | n   | n   | n   |     |      |     |       |
| <b>Count</b>                          |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| d                                     | 5   | 5   | 5   | 5   | 5    | 5   | 5     | 5   | 5   | 5   | 5   | 5    | 5   | 5     |
| e                                     | 4   | 4   | 4   | 4   | 4    | 4   | 4     | 4   | 4   | 4   | 4   | 4    | 4   | 4     |
| n                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |

- \* = requires agreement of the employee, the employer and BCNU (weekend requirement)
- d=0700-1500 hours; e = 1500-2300 hours; n=2300-0700 hours; Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #9

| Work Day | Shift Length  | Innovation   | Staffing |                  |   |   |   |
|----------|---------------|--|----------|------------------|---|---|---|
|          |               |  | D        | D <sup>9.5</sup> | e | N | n |
| Standard | 11.25/<br>9.5 | <ul style="list-style-type: none"> <li>Consistent days off (PT 10&amp;11)</li> <li>Permanent shifts (PT 10&amp;11)</li> <li>Variations in shift lengths (D<sup>9.5</sup>)</li> </ul> | 5        | 1                |   | 5 |   |

|                             | Schedule |             |                |                |
|-----------------------------|----------|-------------|----------------|----------------|
|                             | FT D/N   | PT D/N      | PT N (line 10) | PT D (line 11) |
| Schedule(s) length          | 18 wks   | 6 wks       | 1 wk           | 1 wk           |
| # Full time/part time lines | 18       | 6 x .92 FTE | 1 x .65 FTE    | 1 x .65 FTE    |
| Hours per year (excl stats) | 1,796    | 1,649       | 1,174          | 1,174          |

|                                       | Fri              | Sat              | Sun              | Mon              | Tues             | Wed              | Thurs            |
|---------------------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| <b>Days/Nights, 11.25 Hour Shifts</b> |                  |                  |                  |                  |                  |                  |                  |
| FT 1                                  |                  | D                | N                | N                |                  | st               |                  |
| FT 2                                  |                  |                  | D <sup>9.5</sup> | D                | N                | N                |                  |
| FT 3                                  |                  |                  |                  |                  | D                | D                | N                |
| FT 4                                  | N                |                  |                  |                  |                  |                  | D                |
| FT 5                                  | D                | N                | N                |                  |                  |                  |                  |
| FT 6                                  |                  | D <sup>9.5</sup> | D                | N                | N                |                  |                  |
| FT 7                                  |                  |                  |                  | D <sup>9.5</sup> | D                | N                | N                |
| FT 8                                  |                  |                  |                  | st               |                  | D <sup>9.5</sup> | D                |
| FT 9                                  | D                |                  |                  |                  |                  |                  |                  |
| FT 10                                 | D                | D                | N                | N                |                  |                  |                  |
| FT 11                                 |                  |                  |                  | D                | N                | N                |                  |
| FT 12                                 |                  |                  |                  |                  | D <sup>9.5</sup> | D                | N                |
| FT 13                                 | N                |                  |                  |                  | st               |                  | D <sup>9.5</sup> |
| FT 14                                 | D                | N                | N                |                  |                  |                  |                  |
| FT 15                                 |                  | D                | D                | N                | N                |                  |                  |
| FT 16                                 | N                | N                | N                | st               |                  |                  |                  |
| FT 17                                 |                  | D                | D                | N                | N                |                  |                  |
| FT 18                                 |                  |                  |                  | D                | D                | N                | N                |
| PT 1                                  |                  |                  |                  |                  |                  | D                | D                |
| PT 2                                  | D <sup>9.5</sup> |                  |                  |                  |                  | D                | D                |
| PT 3                                  | st               |                  |                  |                  |                  | D                | D                |
| PT 4                                  | D                |                  |                  | D                | D                |                  |                  |
| PT 5                                  |                  |                  | D                | D                | D                |                  |                  |
| PT 6                                  | N                | N                | st               |                  |                  | N                | N                |
| PT 10*                                | N                | N                |                  |                  |                  |                  |                  |
| PT 11*                                |                  | D                | D                |                  |                  |                  |                  |
| <b>Count</b>                          |                  |                  |                  |                  |                  |                  |                  |
| D                                     | 5                | 5                | 5                | 5                | 5                | 5                | 5                |
| D <sup>10</sup>                       | 1                | 1                | 1                | 1                | 1                | 1                | 1                |
| N                                     | 5                | 5                | 5                | 5                | 5                | 5                | 5                |

- \* = requires agreement of the employee, the employer and BCNU (weekend requirement);
- D=0700-1900 hours; D<sup>9.5</sup>=0900-1900 hours; N=1900-0700 hours;
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked ST will be considered days off.

Sample #10

| Work Day | Shift Length | Innovation                     | Staffing |   |   |   |   |
|----------|--------------|--------------------------------|----------|---|---|---|---|
|          |              |                                | D        | d | e | N | n |
| Standard | 11           | Innovative job sharing (PT1-6) | 5        | 1 | 1 | 5 | 1 |

|                             | Schedule |                           |           |          |
|-----------------------------|----------|---------------------------|-----------|----------|
|                             | FT D/N   | PT D/N                    | PT d/n    | PT d/n   |
| Schedule(s) length          | 15 wks   | 6 wks                     | 3 wks     | 3 wks    |
| # FT/PT lines               | 15       | 9 x .82 FTE (see * below) | 3x.73 FTE | 3x.8 FTE |
| Hours per year (excl stats) | 1,799    | 1,467                     | 1,305     | 1,436    |

|   | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|---|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, 11 Hour Shifts</b>                      |     |     |     |     |      |     |       |
| FT 1  |     |     |     | D   | N    | N   |       |
| FT 2  |     |     |     | N   | N    |     |       |
| FT 3  | D   | D   | D   | D   |      |     | st    |
| FT 4  |     |     |     | D   | D    |     |       |
| FT 5  |     | D   | D   | N   | N    |     |       |
| FT 6  |     |     |     |     | D    | D   | N     |
| FT 7  | st  |     |     |     | D    | D   | N     |
| FT 8  |     |     |     |     |      |     |       |
| FT 9  | D   | D   | D   | st  |      | D   | D     |
| FT 10   |     |     |     | D   | D    | N   |       |
| FT 11   |     | N   | N   |     |      |     |       |
| FT 12   | N   | N   | N   |     |      | D   | D     |
| FT 13   |     |     |     | D   | D    |     |       |
| FT 14   | N   | N   | N   | st  |      |     | D     |
| FT 15   | N   | N   | N   |     |      | D   | D     |
| PT 1*   | D   | D   | D   |     |      |     | D     |
| PT 2*   | D   |     |     | N   | N    |     |       |
| PT 3*   | D   | D   | D   |     |      | N   | N     |
| PT 4*   | N   | N   |     |     | st   | N   | N     |
| PT 5*   | N   |     |     | N   | N    | N   | N     |
| PT 6*   |     |     | N   | N   |      |     | st    |
| <b>Days/Evenings &amp; Days/Nights, 7.5 Hour Shifts</b> |     |     |     |     |      |     |       |
| PT d/e 1  | e   | e   | e   |     |      | d   | d     |
| PT d/e 2  |     |     |     |     | st   | e   | e     |
| PT d/e 3  |     |     | d   | e   | e    |     |       |
| PT d/n 1  | d   | d   | n   | n   | n    | st  |       |
| PT d/n 2  |     |     |     | d   | d    | n   | n     |
| PT d/n 3  | n   | n   |     |     |      |     |       |
| <b>Count</b>  |     |     |     |     |      |     |       |
| D   | 5   | 5   | 5   | 5   | 5    | 5   | 5     |
| N   | 5   | 5   | 5   | 5   | 5    | 5   | 5     |
| d   | 1   | 1   | 1   | 1   | 1    | 1   | 1     |
| e   | 1   | 1   | 1   | 1   | 1    | 1   | 1     |
| n   | 1   | 1   | 1   | 1   | 1    | 1   | 1     |

- \* = these 6 lines are job shared, whereby the shifts are split amongst 9 employees (9x.82 FTE’s). Shifts may or may not be allocated equally amongst all job sharing employees, which may result in a variation of the .82 FTE for individual employees.
- D=0700-1900 hours; N=1900-0700 hours; d=0700-1500 hours; e = 1500-2300 hours; n=2300-0700 hours
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #11

| Work Day | Shift Length | Innovation   | Staffing |      |   |   |   |
|----------|--------------|--|----------|------|---|---|---|
|          |              |  | d        | 11-7 | e | N | n |
| Standard | 7.5          | <ul style="list-style-type: none"> <li>Consistent days off (d/e, PT 1-4; d/n, PT 1,2)</li> <li>Variable start times (11-1900 hrs)</li> </ul> | 3        | 1    | 3 |   | 3 |

|                             | Schedule |                 |                        |        |                    |
|-----------------------------|----------|-----------------|------------------------|--------|--------------------|
|                             | FT d/e   | PT d/e (line 1) | PT d/e (line 2, 3 & 4) | FT d/n | PT d/n (lines 1&2) |
| Schedule(s) length          | 12       | 2               | 6                      | 12     | 4                  |
| # full time/part time lines | 6        | 1x.87           | 3x.47                  | 6      | 2x.49              |
| Hours per year (excl stats) | 1,794    | 1,566           | 848                    | 1,794  | 880                |

|                                       | Fri | Sat | Sun | Mon | Tues | Wed | Thurs | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|---------------------------------------|-----|-----|-----|-----|------|-----|-------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Evenings, 7.5 Hour shifts</b> |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  | e   | e   | e   | e   | e    | e   |       |     | d   | e   | e   | e    | e   | e     |
| FT 2                                  |     |     |     | d   | d    | d   | d     | e   |     |     | st  |      | d   | e     |
| FT 3                                  | e   | e   | e   | e   |      |     |       | 11  | 11  | 11  | 11  | 11   | 11  |       |
| FT 4                                  |     | d   | d   | d   | d    | e   | e     |     |     | st  |     | d    | d   | 11    |
| FT 5                                  | 11  | e   | e   |     |      |     |       | e   | e   | e   | e   | e    | e   |       |
| FT 6                                  |     | 11  | 11  | 11  | 11   | 11  | 11    | st  |     |     | d   | d    |     |       |
| PT 1                                  | st  |     |     | e   | e    | e   | e     |     |     |     | e   | e    | e   | e     |
| PT 2                                  | e   |     |     |     | e    | st  | e     | e   | e   | e   |     |      |     | d     |
| PT 3                                  | d   | d   | d   |     |      |     |       | st  | e   |     |     |      |     |       |
| PT 4                                  |     |     |     |     |      |     |       |     | d   | d   |     |      |     |       |
| <b>Days/Nights, 7.5 Hour Shifts</b>   |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| FT 1                                  |     | d   | d   | n   | n    | n   |       |     | st  | d   | n   | n    | n   | n     |
| FT 2                                  | n   |     |     | d   | d    | d   | n     | n   |     |     |     |      | n   | n     |
| FT 3                                  | n   | n   | n   | st  |      |     | d     | d   | d   | d   | d   | n    |     |       |
| FT 4                                  | n   | n   | n   | n   | n    | n   |       |     |     |     | n   | n    | n   | n     |
| FT 5                                  | st  |     | n   | n   | n    | n   | n     | n   |     |     | d   | d    | d   | d     |
| FT 6                                  | d   | n   |     |     |      | d   | n     | n   | n   | n   | n   |      |     |       |
| PT 1                                  | d   | st  |     |     |      |     | d     | d   | n   | n   |     |      |     |       |
| PT 2                                  |     |     |     |     |      |     |       | d   | n   | n   |     |      |     | d     |
| <b>Count</b>                          |     |     |     |     |      |     |       |     |     |     |     |      |     |       |
| d                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |
| 11                                    | 1   | 1   | 1   | 1   | 1    | 1   | 1     | 1   | 1   | 1   | 1   | 1    | 1   | 1     |
| e                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |
| n                                     | 3   | 3   | 3   | 3   | 3    | 3   | 3     | 3   | 3   | 3   | 3   | 3    | 3   | 3     |

- d=0700-1500 hours; 11 = 1100-1900 hours; e=1500-2300 hours; n=2300-0700 hours;
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked "st" will be considered days off.

Sample #12

| Work Day | Shift Length | Innovation  | Staffing |   |   |   |   |
|----------|--------------|---|----------|---|---|---|---|
|          |              |   | d        | D | e | N | n |
| Extended | 11           | <ul style="list-style-type: none"> <li>Consistent days off (PT 1 &amp; 2)</li> <li>Permanent shift (N, PT 1; D PT 2)</li> </ul> |          | 6 |   | 6 |   |

|                             | Schedule |               |                 |
|-----------------------------|----------|---------------|-----------------|
|                             | FT D/N   | PT N (line 1) | PT D/N (line 2) |
| Schedule(s) length          | 25       | 1             | 1               |
| # Full time/part time lines | 25       | 1x.96         | 1x.96           |
| Hours per year (excl stats) | 1,792    | 1,723         | 1,723           |

|                                    | Fri | Sat | Sun | Mon | Tues | Wed | Thurs |
|------------------------------------|-----|-----|-----|-----|------|-----|-------|
| <b>Days/Nights, 11 Hour Shifts</b> |     |     |     |     |      |     |       |
| FT 1                               | D   | D   | N   | N   |      | st  |       |
| FT 2                               |     |     | D   | D   | N    | N   |       |
| FT 3                               |     |     |     |     | D    | D   | N     |
| FT 4                               | N   |     |     |     |      |     | D     |
| FT 5                               | D   | N   | N   |     |      |     |       |
| FT 6                               |     | D   | N   | N   | N    |     |       |
| FT 7                               | st  |     |     | D   | D    | N   | N     |
| FT 8                               |     |     |     | st  |      | D   | D     |
| FT 9                               | N   | N   |     |     |      |     |       |
| FT 10                              | D   | D   | N   | N   |      |     |       |
| FT 11                              |     |     | D   | D   | N    | N   |       |
| FT 12                              |     |     |     |     | D    | D   | N     |
| FT 13                              | N   |     |     |     | st   |     | D     |
| FT 14                              | D   | N   | N   |     |      |     |       |
| FT 15                              |     | D   | D   | N   | N    |     |       |
| FT 16                              |     |     |     | N   | N    | N   | N     |
| FT 17                              |     |     |     |     |      | D   | D     |
| FT 18                              | N   | N   |     | st  |      |     |       |
| FT 19                              | D   | D   | D   | N   |      |     |       |
| FT 20                              |     |     | D   | D   | N    | N   |       |
| FT 21                              |     |     |     |     | D    | N   | N     |
| FT 22                              | N   |     |     |     |      |     | D     |
| FT 23                              | D   | N   | N   |     |      |     |       |
| FT 24                              |     |     |     | D   | D    | D   | D     |
| FT 25                              |     |     |     | D   | D    | st  |       |
| PT 1*                              | N   | N   |     |     |      | st  | N     |
| PT 2                               |     | D   | D   |     | st   | D   |       |
| <b>Count</b>                       |     |     |     |     |      |     |       |
| D                                  | 6   | 6   | 6   | 6   | 6    | 6   | 6     |
| N                                  | 6   | 6   | 6   | 6   | 6    | 6   | 6     |

- \* = requires agreement of the employee, the employer and BCNU (weekend requirement);
- D=0700-1500 hours; 11 = 1100-1900 hours; e=1500-2300 hours; n=2300-0700 hours;
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

Sample #13

| Work Day | Shift Length   | Innovation                           | Staffing |                  |                  |   |
|----------|----------------|--------------------------------------|----------|------------------|------------------|---|
|          |                |                                      | D        | D <sup>9.5</sup> | E <sup>5.5</sup> | N |
| Combined | 11/9.5/7.5/5.5 | • Variable shift lengths (all lines) | 3        | 1                | 1                | 3 |

|                             | Schedule |        |
|-----------------------------|----------|--------|
|                             | FT D/N   | PT d/e |
| Schedule(s) length          | 14       | 3      |
| # Full time/part time lines | 14       | 3x.85  |
| Hours per year (excl stats) | 1,793    | 1,522  |

|  | Fri              | Sat | Sun              | Mon | Tues | Wed | Thurs |
|--|------------------|-----|------------------|-----|------|-----|-------|
| <b>Days/Nights, 11 &amp; 9.5 Hour Shifts</b> |                  |     |                  |     |      |     |       |
| FT 1   | D <sup>9.5</sup> | D   | N                | N   |      | st  |       |
| FT 2   |                  |     | D                | D   | N    | N   |       |
| FT 3   |                  |     |                  |     | D    | D   | D     |
| FT 4   | D                |     |                  |     |      |     | N     |
| FT 5   | N                | N   | N                |     |      |     |       |
| FT 6   |                  | D   | D                | N   | N    |     |       |
| FT 7   | st               |     |                  | D   | D    | N   | N     |
| FT 8   |                  |     |                  | st  |      | D   | D     |
| FT 9   | N                | N   |                  |     |      |     |       |
| FT 10  | D                | D   | N                | N   |      |     |       |
| FT 11  |                  |     | D                | D   | N    | N   |       |
| FT 12  |                  |     |                  |     |      | D   | N     |
| FT 13  | N                | N   |                  |     |      |     | D     |
| FT 14  | D                | D   | D <sup>9.5</sup> |     |      |     |       |

|  |                  |                  |                  |                  |                  |                  |                  |
|--|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| <b>Days/Evenings, 11, 9.5, 5.5 and 4 Hour Shifts</b> |                  |                  |                  |                  |                  |                  |                  |
| PT 1   |                  |                  |                  | D <sup>9.5</sup> | D <sup>9.5</sup> |                  |                  |
| PT 2   | st               | e <sup>5.5</sup> | e <sup>5.5</sup> |                  | D                | D <sup>9.5</sup> | D <sup>9.5</sup> |
| PT 3   | e <sup>5.5</sup> |                  |                  | e <sup>5.5</sup> | e <sup>5.5</sup> | e <sup>5.5</sup> | e <sup>5.5</sup> |

|                  |   |   |   |   |   |   |   |
|------------------|---|---|---|---|---|---|---|
| <b>Count</b>     |   |   |   |   |   |   |   |
| D                | 3 | 4 | 3 | 3 | 3 | 3 | 3 |
| D <sup>9.5</sup> | 1 | 0 | 1 | 1 | 1 | 1 | 1 |
| E <sup>5.5</sup> | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| N                | 3 | 3 | 3 | 3 | 3 | 3 | 3 |

- D=0700-1900 hours; D<sup>9.5</sup> = 0700-1700 hours; e<sup>5.5</sup>=1700-2300 hours; N=1900-0700 hours
- Stat holidays for each employee must total 11 per year. Once 11 stats have been taken for the year, all remaining shifts marked “st” will be considered days off.

## SELF SCHEDULING

Many variations on guidelines for self scheduling exist. At the very least, the guidelines should include the following:

- Timetable for posting blank and finalized schedules (posting of the finalized schedule must be consistent with the timelines outlined in the collective agreement).
- Staffing requirements per shift.
- Minimum number and type of shifts each staff member is required to work per posting period.
- Guidelines for scheduling vacations and for scheduling during Christmas/New Year's periods.
- Process to review conflicts and/or address staffing gaps/overlaps.

### Samples of Unit Guidelines for Units Practicing Self Scheduling

#### Sample #1:

1. Each schedule is done in six (6) week blocks. The finalized schedule must be posted six (6) weeks prior to implementation.
2. The blank schedule is posted twelve (12) weeks prior to implementation. The Scheduling Committee is responsible for listing the number of shifts required by each nurses' name. Also, the charge nurse shifts are marked in prior to posting (for ease of running totals).

When posting the Christmas/New Years schedule a list of the previous years scheduling for the statutory holidays is posted at the same time.

3. Staff members have three (3) weeks to fill in their desired shifts.
4. Once staff members have filled in their desired shifts, the Scheduling Committee counts all shifts showing "residual" needs. Vacation shifts are not counted in the running total of the number of shifts.
5. The schedule is given back to staff for further changes, of which staff are provided one (1) week.
6. The schedule is finalized during the following two (2) weeks in order that it is ready for posting six (6) weeks prior to implementation.
7. Full-time (1.0 FTE) nurses are required to work:
  - A cycle of 18, 19 and 19 shifts per 3 consecutive six-week blocks
  - 10 days (0700 – 1900) and 8 or 9 nights (1900 – 0700).

- At least 6 shifts must be weekend shifts (weekend is defined as 1900 Fri. to 0700 Mon.)
  - At least 3 weekend shifts must be nights.
  - Each nurse may identify a maximum of 6 shifts per six-week block that cannot be changed (X).
8. Part-time (0.4 FTE) nurses must work:
- A cycle of 7, 8 and 8 shifts per 3 consecutive six-week blocks.
  - 4 days and 3 or 4 nights.
  - At least 2 shifts must be weekend shifts.
  - 1 weekend shift must be a night.
  - Each nurse may identify a maximum of 3 shifts per six-week block that cannot be changed (X).
9. Part-time (0.5 FTE) nurses must work:
- A cycle of 9, 9 and 10 shifts per 3 consecutive six-week blocks.
  - 5 days and 4 or 5 nights.
  - At least 3 shifts must be weekend shifts.
  - 1 weekend shift must be a night.
  - Each nurse may identify a maximum of 3 shifts per six-week block that cannot be changed (X).
10. Part-time (0.6 FTE) nurses must work:
- 11 shifts per six-week block.
  - 6 days and 5 nights.
  - At least 4 shifts must be weekend shifts.
  - 2 weekend shifts must be nights.
  - Each nurse may identify a maximum of 4 shifts per six-week block that cannot be changed (X).
11. Part-time (0.75 FTE) nurses must work:
- 14 shifts per six-week block.
  - 8 days and 6 nights.
  - At least 4 shifts must be weekend shifts.
  - 2 weekend shifts must be nights.
  - Each nurse may identify a maximum of 4 shifts per six-week block that cannot be changed (X).
12. The maximum number of shifts is four (4) in a row. The minimum time off between stretches is 48 hours (i.e., after completing one or more nights).
13. When working a statutory holiday:
- a. on a weekend
    - full-time nurses must work two (2) other weekend shifts.
    - part-time nurses must work one (1) other weekend shift.

- b. mid-week
  - full-time nurses must work two (2) other shifts consecutively.
  - part-time nurses must work one (1) other consecutive shift.

For the purposes of Easter and Christmas, when a nurse is scheduled to work this period he/she is required to work only one (1) of the stat shifts.

Working a stat may be counted as a required weekend shift.

14. Contingency plan for staffing deficits on stats (in particular Christmas/New Years/Easter):
  - It will be the junior person who did not work the given day the previous year who will be moved to accommodate the deficit. With respect to seniority there will not be a differentiation between permanent employees and casual employees in a line greater than four months.
  - Staff must be aware of the potential for their schedule to be changed and why with adequate reasoning on the part of the scheduling committee.
15. There must be at least one senior nurse on each shift.
16. Upon finalization of the schedule the committee is to write over it in black ink so that all shifts are clearly legible.

*Adapted from BC Children's Hospital*

**Sample #2:**

1. All nursing staff have the option of submitting a proposed schedule instead of following a master rotation.
2. Scheduling is usually done for a 6-week period. There may be times however when a longer schedule may be required, i.e. over Christmas or in the summer.
3. All shifts are 12 hours long, either 0700-1900 (D) or 1900-0700 (N).
4. Scheduling requirements for each 18 week block in 6 week periods are as follows:

| FTE | Number of Shifts | Number of Nights | Number of Weekend Shifts* |
|-----|------------------|------------------|---------------------------|
| 1.0 | 19-19-18         | 9-10             | 6-7                       |
| .8  | 15-15-15         | 7-8              | 5-6                       |
| .75 | 14-14-14         | 7                | 4-5                       |
| .66 | 12-12-13         | 6-7              | 4                         |
| .6  | 11-11-11         | 5-6              | 4                         |
| .48 | 9-9-9            | 4-5              | 3-4                       |
| .4  | 7-8-7            | 4                | 3                         |

\*A weekend is defined as from 1900 Friday to 0700 on Monday.

5. Each nurse may identify a maximum of 6 priority shifts per 6-week period on which she/he cannot be scheduled to work.
6. The maximum number of consecutive shifts permitted is 4. Stretches of 4 days or 4 nights are discouraged.
7. The minimum number of hours off after night shifts is 48, with 60 hours recommended.
8. There must be a minimum of one senior nurse on each shift.
9. Nurses may elect to work as many long weekends as they want providing they are scheduled for at least one other shift on a long weekend other than the Stat. You may be moved off the Stat to accommodate others who have not worked any Stats.
10. You must use vacation, LOA or both if scheduling more than seven shifts in a row.

11. The following table indicates the number of vacation shifts to be taken for periods of time off for full time staff. Part time would take a percentage of this depending on their FTE.

| <b>Days off requested</b> | <b>Vacation Shifts Required</b> |
|---------------------------|---------------------------------|
| 8 days off                | 1 vacation shift                |
| 9-12 days off             | 2 vacation shifts               |
| 13-15 days off            | 3 vacation shifts               |
| 16-17 days off            | 4 vacation shifts               |
| 18-22 days off            | 6 vacation shifts               |
| 23-25 days off            | 8 vacation shifts               |
| 26-29 days off            | 10 vacation shifts              |
| 30-35 days off            | 12 vacation shifts              |
| 36 days off               | 14 vacation shifts              |

12. Pre-approved vacation (before Dec 1st) is granted based on seniority. Please indicate pre-approved vacation requests on your schedule. Only 2 people will be granted vacation per shift, although more than 2 people may be granted vacation over a 6-week block. If more than 2 people schedule vacation on a particular shift, adjustment of those shifts will be done based on seniority. The vacation Block that was pre-approved will not change, just the shifts that you schedule vacation for may change.
13. Once the final approved schedule is posted, please review your schedule to confirm your shifts. If your schedule satisfies the above guidelines, but your schedule is unsatisfactory personally, you need to speak with the self-scheduling committee member responsible for that rotation. If they are unable to do anything, you need to try to do shift changes yourself to accommodate your special needs. If after this, you are unable to resolve your difficulties then please contact the Clinical Nurse Coordinators.

*Adapted from BC Children’s Hospital (3G Cardiac Sciences)*