

**How to Manage
your
Shift Pattern**



Holidays and Absences

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Contents



Introduction	5
Authors	7
Calculating How Many Staff You Need	9
Different Types of Shift Patterns	17
Holiday Management	29
Holidays Included Shift Patterns	39
Holidays Excluded Shift Patterns	55
Shift Cover Arrangements	75
Banked Hours	95
Fatigue and Shift Work	105
Incorporate Training into your Shift Pattern	115
Terms and Conditions of Employment	135
Implementing a New Shift Pattern	157
Glossary	159
References	163
Index	165
Appendix	169

Introduction



The aim of this book is to provide you with the tools and techniques to make a shift pattern run smoothly. The main objective of any shift pattern is to ensure you have the right people with the correct skills when and where you want them. The major issues, which are going to prevent you from achieving this objective, are staff holidays and absences. Therefore the two key topics of this book are how to organise staff holidays and staff absences so that they do not affect the operation.

Accommodating Holidays

This book is aimed at all levels of staff within an organisation. It is designed to help staff understand why their 'simple' request for a holiday actually is the start of a very complex operation to accommodate it. For line managers it explains why a 'simple' request for a holiday can be so difficult to accommodate. The book covers the techniques and policies that can make the accommodation of holidays a 'simple' procedure.

Coping With Absences

An absence, with whatever notice, is always 'a pain'. However, everyone is absent at some time and the process of covering for an absence should be a routine procedure. This book looks at the techniques that companies use to cope with an absence.

Workload

Your workload is what drives the shift pattern. The workload is the reason for employing staff. The workload is the prime driver in all decisions. If you know your workload then you can implement the techniques in this book to ensure you always meet it.

Structure of the Book

This book has been arranged to take you through the same process that we, as shift pattern consultants, always go through on starting a new project. The first step is always the workload. Hence the first chapter in this book "Calculating How Many Staff You Need" is about workload, and converting workload into staffing numbers.

The second chapter covers different types of shift patterns. This is to help familiarise you with some of the short hand employed in shift pattern design and to show some of the most popular shift patterns. The appendix also contains some of these shift patterns extended for a full year. If the workload is flat, that is if the staffing requirement is the same on every shift, then these shift patterns can just be lifted as is. For variable workloads we would normally still use one of these shift patterns as a template and then tailor it according to the workload and company preference. These shift patterns are there to help you identify the type of shift pattern you want and to give you a glimpse into the countless patterns available to you.

Holidays are the bane of all shift managers lives; this is because there are a lot of holidays to fit into every year. Summer is never long enough and by the time Christmas comes around you find out that everyone has two weeks of holiday left and they all have to take it before the end of the year. Our section on holidays takes you through the reasons why

holidays are so hard and gives you practical solutions to reduce or even eliminate the problem altogether.

Once you have organised your holidays the next biggest problem to tackle is absence. Having people going off sick should not be the catastrophe many shift managers believe it is. If the correct procedures are in place upfront then it doesn't have to be expensive, problematical or stressful. Sooner or later someone will be absent but with a little forethought and planning you can prepare for any absence.

Next we come to the little extras, things that you should have in mind but may not necessarily be applicable to every situation; training, fatigue and breaks. Incorporating training into your shift pattern upfront can save you a lot of headaches later on. Especially if you want to employ team-training days, trying to find one day when several people are available is never easy. However if you inform them when the training day will be, at the same time as you issue the shift pattern, then there is no problem. Fatigue on a shift pattern is common due to night shift working. However there are shift patterns which can mitigate this and sometimes all it takes is a little education to ensure that people leave work feeling nearly as refreshed as when they started. Having paid or unpaid breaks can radically alter the calculations, so bear in mind which you have.

Once you have solved all of your shift pattern problems the next step is to implement the solutions. First of all check your terms and conditions of employment. All terms and conditions of employment are originally written for office workers by office workers. Therefore they do not accommodate 24/7 working. Hence you will always need to rewrite the terms and conditions of employment or write a new one for shift workers. The most important part is definitions, defining what you mean by a week, or a day, can have very different connotations when working shifts.

The second stage is to write down your new policies and implement them. This could involve changing the whole shift pattern or just making minor changes. The last section of this book goes through step-by-step how you change your way of working. Remember changing shift patterns doesn't have to be hard. The fastest that we have seen it done was in less than 24 hours. The organisation called us in to change the shift pattern for a team of staff. Following a short consultation with the staff in the morning, we set-up the shift pattern for the year, incorporating their current holidays. By the afternoon the staff saw the new shift pattern and decided to start first thing the next morning. It really can be that simple.

Once you have your new hassle free shift pattern you'll wonder how you ever used to manage before.

Authors



Alec Jezewski graduated from UMIST with a degree in Mechanical Engineering. He then went on to do post graduate research at Nottingham Trent University setting up computer models for high-pressure gas cylinders. Next Alec joined Rolls Royce in the Stress Office for several years. His speciality was creating computer models to compare theoretical design with real structures. In 1985 Alec started his own 24/365 business.

In 1994 Alec Jezewski founded CDT to help organisations write their shift patterns. The idea was born in his mind after watching his wife struggle to write shift patterns for their 24 hour 365 days per year business. Being an engineer he decided that there had to be a logical approach to shift pattern design and a way to run the shift pattern effectively. What he found was that there was very little literature on the subject and most of this was contradicting and non-practical.

So he began to create a software program to aid in designing shift patterns. The software Visual Rota calculates the hours worked on each shift, tracks changes to the shift pattern and helps with maintaining the accounts. Once he had the software up and running at his business, he then tried to market the software to other 24/365 businesses and operations. However he found one very large stumbling block in his way, at that time (early 1990s) very few small businesses had a PC and even fewer had shift pattern managers who could operate one proficiently. They all preferred pen, paper and a lot of tipex. Alec Jezewski then tried selling the program to other larger businesses, and found that while very few of them wanted the program, they all needed help in creating shift patterns. So in 1994 he started his consultancy firm.

Now after 14 years in the field he not only helps create shift patterns for companies but he also advises clients on how to define workload, select a shift pattern, organise cover arrangement, shift allowances, advise staff on fatigue, writes employment rules and negotiates with unions.

He has worked with companies all around the world including Australia, Bermuda, USA, Canada, and Europe. Many of his clients are companies from abroad who have UK based operations. Companies he works for range from the very largest to small offices. Some of his more illustrious clients include UK Government, including 10 Downing Street, Royal Bank of Scotland, Barclays, ICI, Twinings, Exxon Mobile, BP, Novartis, NCR, Universities, Carphone Warehouse, Rabo Bank, and National Grid to name but a few.

In 2001 Angela Moore joined CDT. Angela has a BSc from UMIST in Mathematics, Statistics and Operational Research, where her final year thesis was modelling call centre workloads. Angela then went on to obtain an MSc in Operations Management from Manchester Business School where her dissertation was on comparing shift patterns used in the public and private sectors. Being a mathematician and statistician she has assisted on many projects by improving the overall shift pattern designs, helping companies define their workload and run operations more effectively.

Holiday Management



Holidays are the bane of all Shift Managers lives; this is because there are a lot of holidays to fit into every year. Summer is never long enough and by the time Christmas comes around you find out that everyone has two-weeks of holiday left and they have to take it before the end of the year. So how do you squeeze it all into a year?

Until we start to look at this problem in detail, and do some basic arithmetic, we cannot comprehend the enormity of this task. Even in a small office hours environment, say 10 people, they will all have about 6 weeks of holiday each. That is about 60 weeks of holiday to fit into 52 weeks in a year. That means that at least one person will have to be on holiday every day of the year.

People on holiday cost money, in holiday pay and in lost production or under utilised equipment. We either need to replace them or have extra staff around in case someone wants a holiday – but how many do we need and what skills should they have? A lot of processes require small numbers of staff with specialised skills, so if an operation takes a team of 5 staff all with different skills, how do we maintain the team when they are due 30 weeks of holiday between them?

Holidays also cost a lot in manager's time. If you think of how much effort has to go into processing one holiday request, and then multiply it by the number of staff you are looking after, the final figure is huge. Not only must we look at each request individually to see if it can be accommodated, we also have to plan the operation to run without that person. Very few requests are denied once asked for; we simply make the effort of fitting it in with all the other requests from everyone else. A lot of management time is wasted in re-organising the work. A part of the holiday request and granting process is that managers get involved in the personal lives of their staff, and hear about all the little problems and reasons behind why they have to have exactly 'that holiday on that date'. So the best way to reduce the manager's workload is to alleviate the necessity for the managers to have to listen to all of their problems.

Now you can look at the problem you have by looking at the number of staff you employ and the annual number of holidays they have. 10 staff equals 300 days of holidays, 100 staff equals 3000 holidays, and someone has to deal with them. What is needed is a system that manages the holidays with almost zero effort, zero time and leaves the company unaffected.

Holidays Included or Holidays Excluded?

If you are not aware, there are two main shift patterns that are used very widely. Holidays Included Shift Patterns are almost effortless, very efficient, minimal management involvement and staff usually favour it. Basically, all the holiday entitlement that everyone has is incorporated into the shift pattern. This will give all staff a huge amount of 'holiday time' off each year and at very regular intervals. On typical terms of employment, say 40 hours per week with 5 weeks of holiday plus Bank Holidays, each person gets between 15

Summary

When it comes to designing shift patterns, holidays are a major issue. All of the shift workers will want a holiday, every year and what is worse they will all want them at the same time.

A Holidays Included Pattern is one where all of the staff have their holidays incorporated into the shift pattern at the start of the year. The holidays are spread evenly throughout the year and ensure that everybody gets good quality time off with no favouritism. Once you have experienced a Holidays Included Shift Pattern you will never want anything else.

Attractions to staff of working a Holidays Included Shift Pattern are:

- they get good quality time off at frequent and regular intervals
- their holidays are very private
- more freedom to select their holidays by swapping shifts

Attractions to a company of operating a Holidays Included Shift Pattern are:

- it is cheaper
- lower administration costs
- lower shift allowances
- more efficient system
- able to maintain the correct staffing levels at all times

Even the office shift pattern can be turned into a Holidays Included Shift Pattern. It will work with any number of people, even for one person, and it is almost always a cheaper option than the holidays excluded equivalent.

Index



1
10-hour Shift, 14, 170
12-hour Shifts, 91

2
232 8-hour Shift Pattern, 190
232 Shift Pattern, 26, 46, 56, 100, 128,
129, 130, 131, 192, 194, 232, 244
2-shift System, 20, 91, 170, 186

3
3ON-3OFF, 28, 29, 49, 50, 51, 99, 214,
218
3336, 216
3-shift System, 20, 91, 170, 188

4
4ON-4OFF, 24, 25, 26, 29, 38, 48, 49, 92,
196
4448, 198, 200
4ON-6OFF, 49
4-shift System, 21, 170

5
554 Shift Pattern, 27, 47, 54, 56, 72, 210,
212

6
62 8-hour Shift Pattern, 23, 238, 240, 242

7
7ON-2OFF, 22

8
8&12-hour Shift Pattern, 220, 222, 224,
226, 228, 230
8-hour 232 Shift Pattern, 234, 236

A
Absence, 5, 6, 71, 82, 85, 90, 96, 101,
112, 126, 136, 145, 161, 162, 165, 170,
172, 173

Additional Working Hours, 156
Ad-hoc Work, 112, 158
Afternoon Shift, 170
Agency Staff, 80
Annual Adjustment, 163
Annual Hours, 166
Annual Shutdowns, 170
Annual Sickness, 10
Annualised Hours, 9, 170
Authorisation, 163
Averaging, 151

B

Bank Holidays, 9, 10, 11, 13, 14, 16, 33,
63, 64, 68, 70, 103, 105, 144, 152, 153,
157, 170, 172
Bank Hours. See Banked Hours
Bank Staff, 80
Banked Hours, 54, 56, 68, 69, 73, 79, 81,
88, 103, 104, 105, 106, 107, 108, 109,
110, 111, 112, 140, 145, 157, 158
Creating Bank Hours, 103
Purchasing Banked Hours, 104
Breaks, 114, 115, 121, 156, 168, 170
Meal Breaks, 156

C

Calendar Year, 170
Call In. See Cover
Call Out. See Cover
Christmas, 32, 103
Commuting, 116
Company Year, 170
Contracted Hours, 10, 11, 16, 63, 70,
111, 151, 157
Cover, 7, 71, 73, 82, 85, 86, 88, 90, 93,
95, 101, 145, 159, 170, 173
Cover Period, 91, 92, 170
Cover Roster, 109
On-Call Allowance, 96

D

Days, 9, 24, 26, 27, 28, 50, 54, 92, 154,
170
Day Shift, 170

HOW TO MANAGE YOUR SHIFT PATTERN

JEZEWSKI & MOORE

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In this eye-opening book CDT shows us how to effectively manage holidays, absences and create a shift pattern that actually manages itself.

Key topics covered in this book include:

- Calculating How Many Staff You Need
- Different Types of Shift Patterns
- Holiday Management
- Holidays Included Shift Patterns
- Holidays Excluded Shift Patterns
- Shift Cover Arrangements
- Banked Hours
- Fatigue and Shift Work
- Incorporate Training into your Shift Pattern
- Terms and Conditions of Employment
- Implementing a New Shift Pattern