



citisales Jobs That Work study

What is Workplace Flexibility for Hourly Retail Workers?

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INTRODUCTION

The business demands of the 24/7 global economy in combination with employees' needs to meet work and family responsibilities are creating a demand for flexible work solutions. However, within many workplaces, flexible work policies and practices are only offered to professional, salaried workers, at the exclusion of workers in hourly jobs.¹ Moreover, the typical forms of flexible work options offered to salaried workers (flex-time, part-time work or job sharing) do not easily transfer to hourly jobs, especially hourly jobs in the retail sector.² As a result, it is not unusual for managers, supervisors and human resource practitioners to consider it impossible to provide workplace flexibility for people in hourly jobs.

CitiSales is one company that has shown flexibility for hourly workers is not only possible, but viewed by many as a critical component of their success in the retail industry. When at its best, CitiSales uses workplace flexibility as a strategic business practice to respond to customers' needs and to attract, engage and retain top talent among their hourly workforce. At

CitiSales, a range of flexible work practices for hourly workers have been described as reflective of the company's workplace culture, rather than as an employee benefit. As a way to understand this culture of flexibility, this issue brief identifies and defines the flexible work practices and strategies used by CitiSales managers.

WHAT IS WORKPLACE FLEXIBILITY FOR HOURLY RETAIL WORKERS?

At CitiSales, flexible work practices for hourly workers primarily include strategies that give employees control over their schedule and provide accommodation/job security around work-life conflicts. As illustrated in Table 1 on the following page, CitiSales uses six primary forms of flexible work practices:

- schedule preferences
- pre-planned schedule modifications
- just-in-time schedule changes
- flex-place
- reduced work hours
- short-term leave

About this Issue Brief

This issue brief, *What is Workplace Flexibility for Hourly Retail Workers?* discusses the culture of flexibility for hourly workers in a large U.S. retail store, referred to as CitiSales. The quotes in this brief have been taken from interviews with CitiSales regional vice presidents and district managers that were conducted as part of the study.

Two primary research questions are examined:

- What is workplace flexibility for hourly retail workers?
- What is the role of the store manager in ensuring workplace flexibility?

	Flexible Practice	Types	Application
Informal Practices	<p>Schedule Preferences</p> <p>Allowing employees to have some say about their work schedule</p>	<ul style="list-style-type: none"> ■ Preferences for specific days, shifts or hours ■ Preferences for a set routine schedule 	<p>CitiSales seeks diversity in scheduling preferences of their workforce in order to fill the 24/7 scheduling demands of their business</p>
	<p>Pre-Planned Schedule Modifications</p> <p>Giving employees the opportunity to request that they not be scheduled for a particular day or shift prior to the creation of the weekly schedule</p>		<p>Each store provides a mechanism for employees to request times or days off in advance of the creation of the schedule</p>
	<p>Just-In-Time Schedule Changes</p> <p>Permitting employees to request a change to the existing schedule</p>	<ul style="list-style-type: none"> ■ Employee-generated schedule coverage ■ Shift swapping 	<p>Once the schedule is posted, employees can use either type of change to the existing schedule with the approval of the manager</p>
	<p>Flex-Place</p> <p>Permitting employees to work at more than one store location</p>	<ul style="list-style-type: none"> ■ Community Flex-Place is when employees work at multiple locations within the same geographic area ■ Regional Flex-Place is when an employee works at store locations in different geographic areas 	<p>Used to provide employees with full-time hours/benefits</p> <p>Provides greater shift coverage for stores within close proximity</p> <p>Used to attract and retain students, interns and workers who live in different parts of the country during different parts of the year</p>
Formal Policies	<p>Reduced Work Hours</p> <p>Working fewer hours than one would normally be scheduled to work</p>	<ul style="list-style-type: none"> ■ Full-time employees can work as few as 30 hours and maintain benefits ■ Part-time employees can request to work fewer hours to accommodate personal needs 	<p>Provides valuable employees the latitude to manage personal/family issues, take time to pursue personal development opportunities or simply work fewer hours</p>
	<p>Short-Term Leave</p> <p>Offering full-time employees job security if they plan to be off work for more than a week for purposes other than those stipulated by the Family Medical Leave Act</p>		<p>Enables employees to take extended time to manage personal/family issues</p> <p>Allows foreign-born/immigrant employees the time to travel/visit home</p>

SCHEDULE PREFERENCES

“I met a young lady just yesterday that comes in about 4, 4:30 in the afternoon and works until 9 every night. And that works out great for her. Her husband works in the day. She has two little ones. So, she stays home. And then when he comes home, she goes to work.

So, they have no child care and it works out great for them, and so those are the types of things I think that retailing offers and probably what brings a lot of people to us.”

Permitting employees to have some choice into the times and days they are scheduled to work is one of the primary ways CitiSales gives hourly workers control over their schedules. Managers use two types of accepted practices: 1) preference for specific days, shifts or hours 2) preference for a set schedule.

From a business standpoint, providing employees the opportunity to request certain days, shifts and hours is matched with the store’s staffing needs. For employees, the practice allows them to coordinate their work schedule with off-the-job responsibilities. The practice requires employees to provide store managers their schedule preferences two weeks in advance of the schedule posting.

A routine schedule allows employees to work the same shifts or days each week, giving them predictability in their jobs. Routine schedules may take the form of working fixed days, fixed times, fixed days and times, or a routine that rotates regularly. For instance, an employee may know she works every Monday, Wednesday, and Friday and the times vary; or she may know that she works Tuesday, Thursday, Saturday one week, and then Monday and Wednesday the following week.

Allowing hourly workers to work their schedule preferences is challenging. Several managers noted that it is impossible for everyone to work a routine schedule in the 24/7 world of retail. Even so, most CitiSales managers provide this option for hourly workers.

PREPLANNED SCHEDULE MODIFICATIONS

“And if you have to go to school, or you go bowling this night, or you have your church meeting this day – you know, we’ll work around that, as long as everybody ...as long as we’re still going to be able to meet the needs of the business.”

Pre-planned schedule requests allow employees to request that they *not* be scheduled for a particular day or shift *prior* to the creation of the weekly schedule. For instance, if an employee has a medical appointment or a teacher conference to attend, he may request that day off. This type of flexible practice is useful to employees who have both routine and non-routine schedules. It allows employees to plan ahead for non-work events and still be scheduled to work the number of hours they prefer. While the managers interviewed had various practices regarding this type of flexibility, most said they prefer to receive requests such as these two weeks before the schedule is posted.

JUST-IN-TIME SCHEDULE CHANGE

“Say, I need off. Can you find somebody? Depending on how far out it is, sometimes it’s easier than other times. It just depends. Now, there is no set standard, no set policy. It’s kind of up to whoever is in charge of that store. And, like I said, if they have problems, [finding someone] they can always work their way up [by asking the store manager to find someone to cover the shift.] And, I haven’t had any issues in any of my stores.”

Just-in-time schedule change allows employees to request modifications to the existing schedule. This practice creates a mechanism whereby employees can modify their schedule when unexpected events arise. Two forms of just-in-time schedule change practices are used: 1) employee-generated schedule coverage and 2) shift swapping. Both require employees to work closely with supervisors and often their co-workers as well.

Employee-generated schedule coverage is the practice of allowing an employee to have his or her shift covered by another employee who agrees to work for him or her. For employees, this option is particularly important for addressing last minute situations without jeopardizing employment. CitiSales

managers prefer that employees find co-workers to cover shifts and then inform them of the change rather than asking the manager to find someone.

Shift swapping authorizes employees to exchange shifts with other employees without losing their preferred number of work hours per week. Once an employee identifies someone with whom to swap shifts, store supervisor approval is required. A challenge of shift swapping is ensuring that the employees have matching skill sets and training.

FLEX-PLACE

“With payroll budgets being what they are and it is [set up] by store, we like to make sure people have the ability to work, and sometimes it is a true benefit to us as a district if they are willing to split their days, work a couple of days at one store and then go over to another store... there are a lot of stores within a pretty short distance of each other and that certainly helps accommodate us all if people are willing to do that.”

Flex-place allows employees to work in more than one location. There are two applications of flex-place at CitiSales, community flex-place and regional flex-place. Community flex-place refers to situations where employees work at multiple store locations within the same geographic area in order to get their preferred number of hours per week, meet their availability needs, or help fill gaps in store staffing need.

“One of my floaters is very willing; her husband is a stay-at-home dad, so we send her to the beach for the weekend, one weekend a month to help out the other district, and then she and her family get a vacation and her kids and her husband do anyway. And I do have one worker that is working for us primarily because she wants to do that flex place.”

The second form, regional flex-place, is a strategy that gives employees an opportunity to work at different store locations that are not in the same region during different times of the year. The best examples of regional flex-place are people who live seasonally in different parts of the country. For instance, an older worker may live and work in the northeastern part of the U.S. during the spring, summer and fall, and then transfers to a home and a job in Florida for the winter. Managers perceive flex-place practices as a win-win for the company and the employee.

REDUCED WORK HOURS

“Dropping from 40 to 30, if they choose to do that, it is certainly an option. We would just [ask that] if they are going to stay full time, they just wouldn't be able to drop below a 30-hour average.”

Unlike the preceding types of flexibility, reduced work hours is a formal, organizational policy, rather than an informal practice. At CitiSales, full-time employees can reduce their hours to as few as 30 per week without the loss of full-time status and associated benefits. The policy stipulates that an employee must work *an average* of 30 hours per week during the pay period to receive full-time benefits.

“They have full-time benefits, but only work 30 hours a week.”

From the managers' perspective, this policy allows employees to limit work hours to an average of 30 hours a week without the fear of losing their health benefits or full-time status; it also provides job security when life events require employees to work less than the traditional 40 hours per week.

SHORT-TERM LEAVE

“In this market we have a lot of individuals that are from foreign countries. One of the things we experience every year is that they like to take a month off and go back home because it is very expensive to buy tickets and they have family members they haven't seen in years. So I think that is one of the issues that really comes up with the leave policy-- getting a personal leave granted.”

Like reduced work hours, short-term leave is a formal policy that is accessible to all workers at CitiSales. Short-term leave offers full-time employees job security and continued health benefits if they plan to be off work for more than a week. Within CitiSales, short-term leave is for purposes other than those stipulated by the Family Medical Leave Act. Employees may use this option to deal with family health issues, caretaking responsibilities or to visit family who live in another country. While there is an approval protocol in place and employees are not paid during a leave, they do retain their full-time status.


WHAT IS THE ROLE OF THE STORE MANAGER IN ENSURING WORKPLACE FLEXIBILITY?

One critical key to ensuring workplace flexibility for hourly workers is to give managers autonomy and authority to develop a scheduling system that works best for their particular operation. At CitiSales, this decentralized approach allows for creative solutions to scheduling – matching the unique needs of an individual store with the availability of the local workforce and customer patterns.

Managers see the range of flexible work options as an important asset to business operations. The 24/7 nature of retail requires that stores have employees available to work a variety of shifts. Employing people with a range of time preferences can create optimal business situations where the employer can assign schedules most conducive to business *and* employee needs.


See Issue Brief #4: *What Type of Management Strategies Promote a Culture of Flexibility for Hourly Workers?* for more detail about manager and supervisor strategies for incorporating workplace flexibility into daily organizational operations.

ACTION STEPS

 **1. Authorize managers and supervisors to develop a scheduling system that works best for their particular operation and workforce.** Time matters to employees. Employees want to be able to have some say into their work schedule. Likewise, there are inevitably unexpected events. Employees need some mechanism for changing a work shift once it has been scheduled if a last minute matter comes up. Giving managers and supervisors leeway to devise a scheduling system that matches business goals with employees' preferences is a win-win for the company and for the employee.

 **2. Encourage managers to develop a range of flexible work schedules that fit with customer patterns, local workforce needs and business goals.**

Creating a culture of workplace flexibility for your hourly workforce takes creativity and “out of the box” thinking. Encourage managers and supervisors to think collaboratively about how to develop flexible work solutions that fit with customer patterns, local workforce needs and the stores’ business goals. A range of solutions is ideal, as employees have varied preferences and work-family circumstances that may influence their schedule availability and needs.

 **3. Hire employees who prefer to work schedules that fit with your business operations.** Workplace flexibility within a company is maximized by hiring employees with varied work schedule preferences. Obviously it is easiest for retail operations to hire employees who are available to work almost any shift. However, this type of employee is hard to find. Thus, consider hiring employees who have a diverse range of schedule preferences. Research suggests that when employees are able to work schedules that fit with their life outside the job, they are more engaged in their job.

¹ Swanberg, J., Pitt-Catsouphes, M., & Drescher-Burke, K. (2005). Organizational Justice: Access to Flexible Work Arrangements. *Journal of Family Issues*, 26(6), 286-312.

² Richman, A., Johnson, A., & Buxbaum, L. (2006). Workplace Flexibility for Lower Wage Workers. *Corporate Voices for Working Families*.

About the CitiSales Study

The data presented in this brief are part of a larger, multi-method study which examines the individual and organizational effects of quality workplace practices for employees in hourly, front-line retail jobs and for older workers in professional and hourly jobs in the same organization. The study was conducted in collaboration with a *Fortune 100* retail firm referred to as “CitiSales.” The company operates over 6,000 stores throughout the United States. Survey data were collected in 2006 from 6,085 employees within 388 stores in three geographical regions of the U.S.; 72% of employees surveyed responded. The hourly worker sample is 3,903. See Issue Brief #1: *Introduction to the CitiSales Study* for a detailed description of the hourly worker sample. Qualitative data were collected from 38 district managers and three regional vice presidents overseeing the operations in these stores.

Sample and Methods: Findings presented in this issue brief were gleaned from the qualitative interviews with senior management. Interviews were conducted in-person or by phone. Senior management were asked open-ended questions about managing an hourly workforce, types of flexible work options available to hourly workers at CitiSales, scheduling of hourly employees, and cost/benefit of offering flexible work options. Transcripts from the interviews were systematically coded and analyzed by the research team. For further details about the research methods, please contact Dr. Jennifer Swanberg at jswanberg@iwin.uky.edu or Dr. Jacquelyn James at jamesjc@bc.edu.

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About the Research Team



Jennifer E. Swanberg, Ph.D., is co-principal investigator of the CitiSales Study and is the executive director and founder of the Institute for Workplace Innovation (iWin) at the University of Kentucky, and an associate professor in the UK College of Social Work with joint appointments in the Colleges of Medicine and Public Health. Her research has focused on quality

workplaces as a business and work-life effectiveness strategy, access to workplace flexibility among under-represented working populations, and the use of human capital and quality employment as a form of economic development. Dr. Swanberg’s research has been published in top-tier research journals, and she has appeared as a national and international work-family expert on television and radio including MSNBC, CNN, CBS, NPR, and BBC. She has been recognized by Alliance of Work-Life Progress as one of the profession’s Rising Stars, and her research has been recognized as among the top research articles by the Rosabeth Moss Kanter Award for Excellence in Work-Family Research.



Jacquelyn B. James, Ph.D. is co-principal investigator of the CitiSales Study and is the director of research at Boston College’s Center for Work & Family. She received her Ph.D. in personality and developmental psychology at Boston University. Prior to coming to Boston College she was associate director of the Murray Research Center: A Center for the Study

of Lives at Harvard University. Her research has focused on the meaning and experience of work in women’s lives, gender roles, and adult development. She and her colleagues have published numerous articles, opinion pieces, and four edited books. The most recent volume (with co-author Dr. Paul Wink, professor of psychology at Wellesley College), *The Crown of Life: Dynamics of the Early Postretirement Period*, is about the opportunities and challenges inherent in the early retirement years for new generations of retirees. Dr. James is past-president of the Society for the Study of Human Development and serves on the editorial board of the society’s flagship journal, *Research in Human Development*.

Mac Werner, MSW, works at the University of Kentucky Institute for Workplace Innovation as a research associate. He has a BS in business from the University of Evansville, an MSW from the University of Kentucky and is currently completing course work toward a Ph.D. in social work. His background includes over a decade of experience as a small business owner and substantial experience in program management and design. Over the past four years, he has worked extensively in the field of social science research, focusing on program evaluations in the criminal justice and child and family welfare systems.