



A Practical Toolkit for Leaders

Flexible Shift Scheduling in the Food and Beverage Sector

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The current issue

The Canadian food and beverage (F&B) sector has been struggling with staff turnover and high vacancy rates, a trend worsened by the COVID-19 pandemic. In early 2020, job vacancies in this sector were 4.4%, but by early 2022 they had leaped to 11.9%.¹ In December 2023, Alberta's F&B sector had the highest vacancy rates in the province.²

One promising strategy to reduce the vacancy rate is to increase the employment and retention of newcomer young adults—those aged 18 to 29 who have arrived in Canada within the past five years. In 2020, newcomer young adults had an unemployment rate of 19.8%.³ Implementing flexible shift scheduling is one strategy that can help support the retention and well-being of employees and contribute to business sustainability and success.

The Government of Alberta is working in partnership with the Government of Canada to provide employment support programs and services.



Introduction

How to use this toolkit

This toolkit provides F&B sector leaders with practical tools to plan, implement, and evaluate flexible shift scheduling. It is part of a training and capacity-building initiative to create workplaces that support newcomer young adult employment, aiming to help improve employee hiring and retention in the F&B sector. This toolkit is intended for supervisors, operators, managers, and executive chefs, referred to as “leaders” throughout. This toolkit was developed to support newcomer young adult workers, but benefits all staff.

This toolkit is informed by focus groups with supervisors, chefs, managers, and newcomer youth with experience in the F&B sector. Two focus groups were held with four newcomer youth and one focus group was held with six leaders of F&B businesses. Their experiences, narratives, and lived-experience scenarios are featured throughout this toolkit. Quotations with a name attached are from community partners who were part of the Project Planning Team.

This toolkit will help you to:

- Define flexible shift scheduling
- Understand the importance of flexible shift scheduling for your business and employees
- Anticipate challenges to flexible shift scheduling within F&B workplaces
- Recognize the skills needed to practice flexible shift scheduling
- Apply strategies for planning, implementing, and evaluating flexible shift scheduling approaches

You can navigate this toolkit at your own pace and in any order. You can choose where to begin based on your current needs, goals, or challenges. In the first section, you'll find background information about flexible shift scheduling and its importance to the F&B sector. In the second section, you'll learn promising practices across three action areas: planning, implementing, and evaluating flexible shift scheduling. The toolkit also contains reflection questions and supporting resources. You are not expected to apply every strategy or try everything at once. To get the most out of the toolkit, we encourage you to share and discuss it with your staff and management teams. You can return to this toolkit to review content and strategies as needed.

Introduction to flexible shift scheduling

What is flexible shift scheduling?

Flexible shift scheduling is a way to create work schedules that emphasize employee preferences and capacities while meeting business needs.⁴

This scheduling approach involves setting parameters and incorporating flexibility for employees to have a say in the duration and timing of their work shifts and time off. Flexible shift scheduling considers the following factors:

- Dynamic business demands
- Employee preferences and skills
- Labour cost and budget
- Employee well-being and work-life balance

- Time off requests
- Fairness across the team
- Workplace culture
- Labour laws

There are many opportunities to introduce flexibility into your shift scheduling process, and each business will approach it differently. Tables 1 and 2 show examples of common shift patterns and scheduling strategies in the F&B sector. More details about how to incorporate flexibility in shift scheduling are provided in the Action Areas.

Table 1. Common flexible shift patterns and examples in the food and beverage sector

Shift Pattern	Food and Beverage Sector Example
Fixed shifts	A server works a consistent schedule each day and week, such as 11 a.m. to 7 p.m. from Monday to Friday.
Staggered shifts	Employee shifts overlap to cover all times and ensure enough staff support during busy times. Shifts could be: 6 a.m.-2 p.m., 8 a.m.-4 p.m., 10 a.m.-6 p.m., 12 p.m.-8 p.m., and 2 p.m.-10 p.m.
Split shifts	A chef's workday is divided into two shifts with a break in the middle, such as a morning shift from 10 a.m. to 2 p.m. and an evening shift from 6 p.m. to 10 p.m.
Rotating shifts	A hostess regularly rotates through day shifts one week and night shifts the next week.
On-call shifts	A bartender agrees to be available to be called in to work in the evening if the restaurant becomes unexpectedly busy.
Incentivized shifts	A manager offers an extra \$2 per hour compensation for an undesirable shift.
Compressed work week	A kitchen manager works four 10-hour shifts instead of five 8-hour shifts in one week.

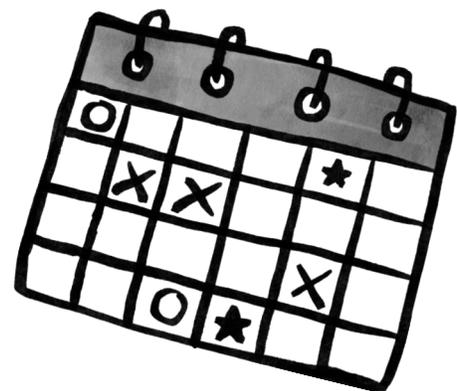
Introduction to flexible shift scheduling continued

Table 2. Common flexible scheduling strategies and examples in the food and beverage sector

Scheduling Strategy	Food and Beverage Sector Example
Self-selected shifts	Employees can choose their preferred shifts from available options using a scheduling system.
Shift swapping	A cook trades an evening shift with another cook's morning shift to attend a family event.
Flexible start/end times	A pastry chef is allowed to start their shift between 4 a.m. and 6 a.m., as long as they complete their 8-hour shift.
Remote work options	An employee completes scheduling, ordering, payroll, and other administrative tasks from home a few days a week.
Part-time or reduced hours	A barista who is also a student works part-time hours to accommodate her class schedule.
Time off	Employees can flexibly use vacation, sick leave, and personal days.

"Creating a schedule is more than just filling shifts. It's about considering each employee's well-being and work-life balance. Are employees closing one night and opening the next? Do they have consecutive days off? Are they facing a long stretch of shifts due to the previous week's schedule? It's essential to accommodate employees' needs, especially for vital commitments like family responsibilities and English language classes. To achieve this, managers must be skilled in problem solving, prioritization, and proactive communication of scheduling policies. This approach fosters a balanced and supportive work environment."

- Karli Fleury, Director, Workforce & Destination Initiatives, Banff & Lake Louise Hospitality Association



Introduction to flexible shift scheduling continued

Why is flexible shift scheduling important?

The F&B sector can be a high-stress, high-pressure environment with long work hours.⁵ There are many benefits to flexible shift schedules, including boosting employee happiness and productivity. Flexible schedules can also help manage labour costs and improve operational efficiency. These benefits boost customer satisfaction, as well as address common challenges in the F&B sector and employment barriers for newcomer young adults. Flexible shift scheduling matters because it:

* **Maintains effective business operations**

Labour is a major expense and investment for F&B businesses. With flexible shift scheduling, leaders can plan and adjust staffing according to operational demands, helping to control labour costs while maintaining service quality. This flexibility can help minimize unnecessary overtime, overstaffing at slow times, and understaffing during peak times. Flexible shift scheduling can also improve hiring and retention. By considering employee availability and preferences, businesses can improve employee retention for busy seasons and from year to year.

* **Promotes employee satisfaction and well-being**

Employees appreciate having more control over their schedules. Shift flexibility can help employees reduce stress and burnout by improving their ability to navigate challenging F&B working conditions like long hours, fast pace, and high-performance standards. Employees tend to be more engaged and committed to their work when they feel encouraged and safe to communicate their scheduling needs. Flexible shift scheduling also promotes work-life balance for employees. This can support employees to pursue personal interests, further their education, manage childcare, commit time to other part-time jobs, fulfill family and community responsibilities, and engage in self-care.

"...this was the perfect fit for me I guess, because you know, it's flexible. You can go, so the shifts were flexible, you can go whenever you want, which shift would you like to pick, you can just pick it, so it was kind of easy for me so that I can manage my work and my studies at the same time."

- Newcomer Young Adult

Introduction to flexible shift scheduling continued

* Enhances customer service quality

Flexible shift scheduling can contribute to better customer service, leading to greater customer satisfaction, improved customer loyalty, and more positive customer reviews. Flexible shift schedules help ensure that the right number of employees are available to meet customer needs at any given time. Customer service is also enhanced when employees are well-rested, scheduled for shifts they are trained for, and satisfied with their work schedules.

* Develops management skills

Creating and coordinating flexible shift schedules requires strong leadership skills, including scheduling, communication, teamwork, problem solving, and conflict resolution. Developing these skills can support F&B leaders to enhance their effectiveness in managing teams and operations, experience professional growth, and be prepared to take on new challenges and more complex roles.



Further reading: PolicyWise for Children & Families has a report on [Understanding strengths and barriers to employment in the food and beverage service sector for newcomer young adults](#).

* Supports newcomer young adult employment

Newcomer young adults tend to be motivated and dedicated, with an interest in gaining experience in the F&B sector.⁶ Flexible shift scheduling can facilitate newcomer young adult entry into the F&B workforce and help meet their unique employment-related needs.⁴ For example, flexible shifts can allow newcomer young adults to accommodate family and community responsibilities, coordinate shifts across multiple jobs, and participate in English classes.⁷ Shift scheduling practices may also reduce the fear that declining work requests, like working overtime or taking extra shifts, will negatively impact their employment.

"For young people coming to Canada, the 18 to 29, they might still be living at home and supporting the family financially, you know, they're part of it. So, flexible shifts in food and beverage could be good for that. Because it might not be a full-time job plus this, it could be full time school plus this. Part-time school plus this, or some other kind of training courses. I find we need to be as flexible as possible."

- Food and Beverage Leader

Introduction to flexible shift scheduling continued

* Fosters a positive workplace culture

Adopting flexible shift scheduling policies and practices is one way to show respect and consideration for employees' needs and well-being. This can demonstrate to employees that they matter. Feeling understood, respected, and valued can foster a more positive and supportive workplace culture and enhance employment experiences in the F&B sector. When positive workplace culture and teamwork exist, employees want to help each other out to cover shifts.

"I think it's the responsibility of successful food and beverage operators to also take care of their workplace culture and their employees, to create a career for people as much as possible. Not to treat them as just expendable resources."

– Food and Beverage Leader

"If the team is working all together, I know that they going to more willing to help each other with the scheduling."

– Food and Beverage Leader

Case scenario reflection: Experiences with flexible shift scheduling

The owner of a family-owned restaurant noticed a rise in employee turnover and a dip in overall morale. Feedback from exit interviews revealed that the rigid shift scheduling was a significant factor contributing to employee dissatisfaction. The owner learned that many employees found it challenging to balance their work schedules with personal commitments. The owner decided to introduce a flexible shift scheduling system to address these issues, including gathering employee input, exploring the use of a digital platform, and rotating shifts. By implementing flexible shift scheduling, the restaurant not only improved employee satisfaction and retention but also enhanced overall operational efficiency and customer satisfaction.

In considering this case study, take a few minutes to reflect on the following questions:

- What has been your experience with flexible shift scheduling?
- Which shift patterns or scheduling strategies have you found most successful to support work-life balance and employee retention?
- How might adopting new approaches to flexible shift scheduling benefit your business and employees?



Introduction to flexible shift scheduling continued

What are common challenges to flexible shift scheduling?

Challenges are inevitable when exploring new and innovative strategies in the F&B sector.

Anticipating and planning for common challenges can help you build a schedule that optimizes labour resources while balancing flexibility with business demands. Challenges will vary between F&B contexts, such as large versus small businesses, restaurants in urban centers versus smaller tourist-driven areas, and corporate franchises versus locally owned businesses.

“Over the years, when you know the business, you know the town, you know you're expecting when you're going to be busy, when you're going to be slow, but we can misjudge the situation as well.”

– Food and Beverage Leader

Some common scheduling challenges include:

- Balancing customer service needs and labour costs
- Accurately predicting business volume
- Accommodating last-minute changes or time off requests
- Keeping all staff informed about their schedules, especially with large teams
- Ensuring that enough experienced employees are working during each shift
- Communicating with employees who are unfamiliar with general F&B workplace expectations, including scheduling
- Managing scheduling conflicts and resolving disputes, such as complaints around the number of work hours or the shift times between employees
- Drawing the line between being a friend and manager
- Managing tipping culture, where employees want to work shifts and positions that generate higher tips
- Complying with labour laws and regulations relating to working hours, breaks, and overtime

Case scenario reflection: Flexible shift scheduling challenges

A new restaurant specializing in authentic North African cuisine just opened in Alberta, Canada. The restaurant, owned by Amara, a passionate chef from Morocco, aims to bring the rich flavours and traditions of North African food to the Canadian dining scene.

Amara recruited several employees from North Africa to maintain the authenticity of the cuisine and ensure the highest quality of traditional cooking techniques. However, she quickly encountered a challenge. The new employees struggled to adapt to the Canadian work culture, particularly regarding shift scheduling and labour laws.

This case highlights the importance of understanding and respecting both the cultural backgrounds of employees and the local labour laws.

Considering this experience, take 3-5 minutes to reflect on the following questions. At your next leadership meeting, take five minutes to share your responses with your team.

- What challenges of flexible shift scheduling pose the highest risk in your specific business?
- What strategies have you or could you use to mitigate these challenges?

"In [North African country], you don't go home from the kitchen until your chef tells you to go home. And whether that's been two hours or 15 hours or 20 hours, you don't go home. These [new employees] didn't get the concept of the schedule. The ability to understand what Canadian working laws and rules and expectations are, they had no idea."

- Food and Beverage Leader



Areas of action

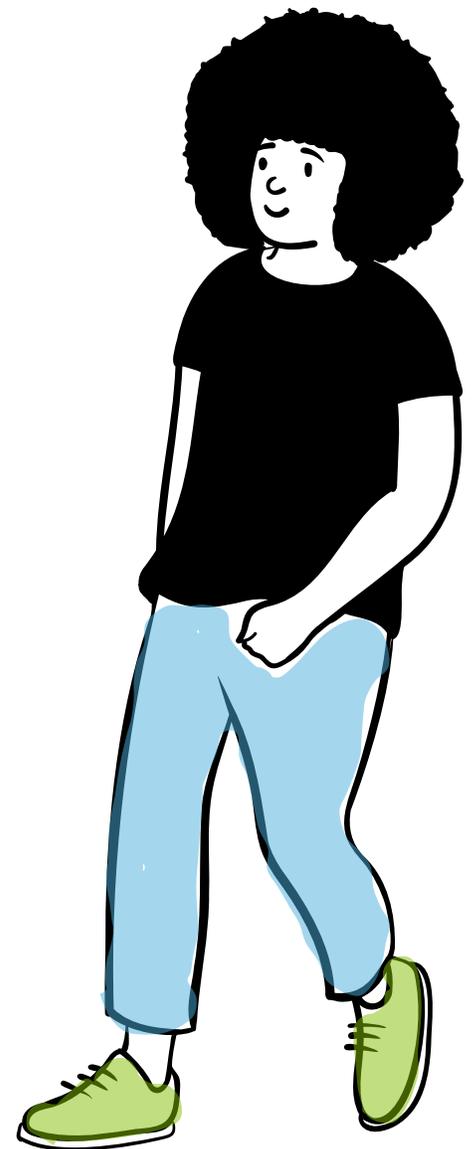
The first section of this toolkit covered the definition of flexible shift scheduling, what it could look like in the F&B sector, and why it's important. This next section contains strategies for you to put into action. There are three areas of action:

1. Planning for flexible shift scheduling
2. Implementing flexible shift scheduling
3. Evaluating flexible shift scheduling

For each action area, there are promising practices, real-world examples, and valuable resources to support implementing flexible shift scheduling. The strategies emphasize newcomer young adult experiences and centre equity, diversity, and inclusion practices. Through these areas of action, you will learn skills and develop knowledge related to communication, conflict resolution, problem solving, teamwork, and leadership.

"You're always going to be learning, no matter how long you are the manager. You want to learn the people skills. I would say that's the hardest part of scheduling, learning the people skills."

– Food and Beverage Leader



Area of Action 1

Planning for flexible shift scheduling



Planning for flexible shift scheduling can help navigate challenges and support implementation. This training topic offers promising practices for understanding business demands, learning your team's preferences and skills, developing policies, planning for diverse holidays, and using software to support efficient and consistent scheduling.

To plan for flexible shift scheduling, you can:

Understand business demands

Understanding business demands can help you strategically plan work shifts in response to peak hours, seasonal changes, special events, customer preferences, and other business needs.⁴ It is important for you to understand these business demands before making scheduling decisions.



Supporting resource: Perplexity, an artificial intelligence search engine, was used to generate a tool in [Appendix 1](#) called “Analyzing Business Trends to Support Flexible Shift Scheduling.” This tool can help leaders analyze their business demands and staff preferences to plan for flexible shift scheduling practices.

* Here are some promising practices:

- Analyze recent trends to determine staffing needs on different days and times.
- Talk to colleagues and employees about what they are noticing about staffing needs.
- Meet with the leadership team to discuss goals and approaches to scheduling.
- Identify areas where flexibility could be incorporated.
- Seek out examples of other businesses implementing a flexible shift model to learn about challenges, successes, and approaches.
- Reflect on the potential effects and considerations of seasonal fluctuations.

To plan for flexible shift scheduling, you can:

Know your team

F&B sector leaders who know their team are better able to create work schedules that will meet business demands and promote employee satisfaction. It is important that you learn about and reflect on your team's strengths and weaknesses, personal circumstances, preferences, and availability.



Supporting resource: [Psychological Safety](#) by Iterum offers a Personal User Manual Template that can be used to get to know your team.

* Here are some promising practices:

- Learn employee preferences and skills through direct interactions during hiring, onboarding, and training.
- Listen to employee ideas and preferences for shift scheduling. For example, find out which employees prefer working in the morning, split shifts, and on weekends.
- Get input from employees about flexible shift scheduling options using multiple methods, such as staff meetings, one-on-one meetings, and surveys.
- Use culturally responsive communication approaches so staff feel comfortable sharing their experiences and insights. For example, an anonymous survey can help capture the preferences of newcomer young adults who may hesitate to speak up directly.
- Clearly communicate that sharing experiences, thoughts, and ideas can be done without repercussions.

To plan for flexible shift scheduling, you can:

Develop scheduling policies and procedures

Informed by your understanding of business demands and employee preferences, establish clear, fair, and transparent policies and procedures for creating and managing shift schedules. Outline the types of flexibility you will incorporate into shift scheduling and how you would respond to different situations and requests.

* Here are some promising practices:

- Find examples of flexible shift scheduling guidelines or policies at similar businesses.
- Ensure policies include details such as:
 - How employees will request time off, including timelines and notice, to allow leaders time to build the schedule.
 - How flexibility will be implemented for each staff role. For example, determine if the same guidelines apply to the head chef and servers.
 - How all employee requests will be considered fairly.
 - How decisions will be communicated with employees.
- Use a shift scheduling policy template to save time.
- Write the policies and procedures in plain language to be accessible for everyone.
- Review and ensure policy compliance with labour laws and regulations.



Supporting resource: Perplexity, an artificial intelligence search engine, was used to generate an example of a flexible shift scheduling guideline in [Appendix 2](#) called “Sample Flexible Shift Scheduling Policy.” This tool can be adapted by food and beverage leaders for their workplace.



Supporting resources:

- The Workplace Inclusion Charter provides a [Flexible Time Away from Work Commitment and Policy Template](#).
- The Workplace Inclusion Charter provides a webinar on [How to Create an Employee Handbook](#).
- The Government of Alberta provides [Employment Standards Rules](#) to help guide policy decisions.

To plan for flexible shift scheduling, you can:

Plan for diverse holidays and days of significance

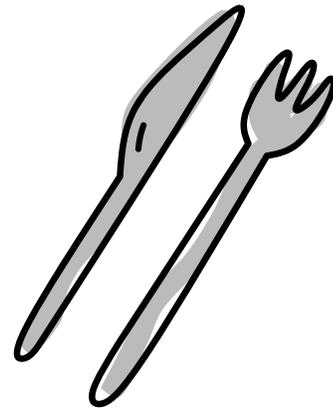
Recognize and accommodate diverse cultural, religious, and public holidays and days of significance when planning for flexible shift scheduling. This is a way to practice cultural competence, foster respect and inclusion, and celebrate diversity within the workplace. Newcomer young adults may be willing to substitute recognized public holidays such as Easter or Christmas for other holidays or days that are significant to them.



Supporting resource: The Government of Alberta provides a [Multicultural Event Calendar](#) of events across the province.

* Here are some promising practices:

- Learn which holidays and days of significance are meaningful to your team. This can be done during the hiring process and through ongoing conversations.
- Update scheduling policies and procedures to incorporate information about time off or substitution for holidays and days of significance.
- Ensure that employees are aware of relevant guidelines or policies, including the process and timelines for having time off requests accommodated in the shift schedule.



To plan for flexible shift scheduling, you can:

Explore scheduling software

Scheduling software is a digital tool that helps automate and manage shift assignments. Scheduling tools can help create shift schedules that accommodate employee preferences, manage shift changes, and provide real-time updates to staff. There are various software options with a range of features, such as:

- User-friendly interfaces
- Employee scheduling functions
- Shift swapping functions
- Time off requests
- Team communication
- Time tracking and analytics
- Integration with payroll systems
- Mobile access



Supporting resource: Forbes provides a list of the [Best Employee Scheduling Software of 2024](#).

* Here are some promising practices:

- Determine if scheduling software would be helpful in your context.
- Consider which features you need and determine your budget.
- Read reviews, if available, and involve staff representing different roles in the business to test out the software with a free trial before committing.
- Choose software that is user-friendly.

“For [a fast-food chain], they have a workplace app and managers put schedules up for every employee, and if you want to get any extra shift, you just let the manager know. And it shows if they had any time off or anything like that. They will call you and ask if you want to take any extra shifts. So yeah, I think it's good. And for the availability, they're super flexible. So, I saw some of my friends had like three hour shifts. So that's really good.”

– Newcomer Young Adult

Case scenario reflection: Planning for flexible shift scheduling

A restaurant leader shared how she gets to know her team and builds a shift schedule according to employee capabilities and business demands:

"I would say the biggest thing is how you build your team, and how you know your team – then you can play with that. You need to know what's happening. You need to know, do you have any functions or banquets? I know that one of the girls can do a group of 35 by herself. Another girl, a group of 35 would be too much. So, you have to know the capability of each person, what they can do."

"Another thing is, I do the trainings with them. So I can see right away, within a few days, how the whole work will go. I'll be with them on the floor till I know the team. So the first month or two till I have the whole team set up and trained, I'm with them all the time, and it's tiring, but then you know where they are at, and when you can leave them alone."

Drawing inspiration from this lived experience quote, take 10-15 minutes to consider the following questions with your leadership team:

- What is unique about our team and their shift scheduling preferences and needs?
- What impacts do we want to see with flexible shift scheduling?
- What are the challenges we might encounter?
- What policies, technology, or other supports would help us manage flexible shift scheduling?



Area of Action 2

Implementing flexible shift scheduling



Implementation can be a transformative process that improves operational efficiency and employee satisfaction. A well-executed implementation phase is important, as it lays the groundwork for a smooth transition and long-term success. The implementation strategies in this area of action will help you ensure that the new scheduling system is adopted smoothly and effectively. You will also be able to anticipate and recognize emerging challenges.

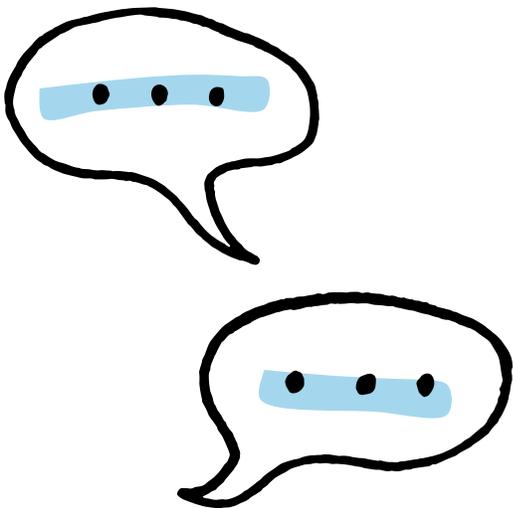
To implement flexible shift scheduling, you can:

Communicate with your team

Communicating with employees around flexible shift scheduling helps them feel heard and involved in decisions that affect them. Integrating employee voices and perspectives at every step can support buy-in when introducing new shift scheduling approaches. Ongoing communication also ensures employees are up to date on their shift schedules.

*** Here are some promising practices:**

- Clearly communicate how scheduling decisions are made, including that it is not possible to accommodate every shift preference.
- Provide a lot of notice when introducing changes and creating shift schedules.
- Use several, culturally responsive methods to communicate any changes to work scheduling processes, including in person, email, physical notices, and via scheduling software if applicable.
- Check that employees understand any changes to work scheduling.



To implement flexible shift scheduling, you can:

Cross-train employees

Cross-training employees can increase the capacity of F&B workplaces to build flexible schedules.⁹ It can be easier to fill in scheduling gaps and swap shifts if employees are trained in multiple roles such as hosting, serving, bartending, food prep, cleaning, and customer service. Cross-training can also offer employees opportunities for skill building, professional growth, and career advancement.



Supporting resource: Harvard Business Review outlines [How the Food Sector is Using Cross-Training to Build Service.](#)

* Here are some promising practices:

- Assess your business needs and determine the roles that could benefit from cross-training, such as servers, kitchen staff, and hosts. Determine which roles align best, for example, hosting and food running.
- Ask employees about their interest in developing skills in other roles or stations.
- Develop a training plan and begin by cross-training employees in the most needed and versatile roles.
- Provide job shadowing opportunities for employees to learn various roles according to business needs and employee preferences, skills, and availability.

To implement flexible shift scheduling, you can:

Create flexible and fair schedules

Creating flexible and fair schedules involves filling shifts in a way that balances business needs with employee preferences and availability.



Supporting resource: The Canadian Centre for Occupational Health and Safety provides definitions and guidelines around [Flexible Work Arrangements](#), including examples of flexible work arrangements.

* Here are some promising practices:

- Determine the staffing levels needed on different days and at different times.
- Review time off requests and employee preferences and accommodate them if possible.
- Apply flexible shift patterns that you identified as best suited for your business. This could include staggered start times, split shifts, on-call shifts, or other shift patterns, as described in [Table 1](#).
- When you create a schedule, be sure to consider:
 - How to fairly allocate shifts across all employees for each pay period.
 - Who works best together.
 - Who can work on their own, and who needs additional support.
 - How sleep schedules may be impacted when changing employees from morning to night shifts, and vice versa.
- Review employee workloads over time to ensure fairness and prevent burnout.
- Share the schedule well in advance.

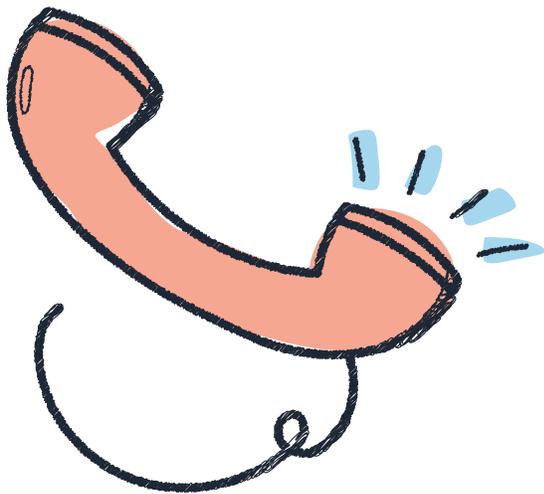
To implement flexible shift scheduling, you can:

Develop an on-call list

Developing a list of employees who are willing to cover shifts on short notice can help maintain appropriate staffing during unexpected employee absences or if staffing needs increase.

*** Here are some promising practices:**

- Include information about the on-call list in the flexible shift scheduling policy, such as expectations, compensation, and notice.
- Consider on-call shifts where employees have the opportunity to choose specific days of the week or times of day that they would like to be on-call.
- Ask employees if they would like to be added to the on-call list.
- Ensure that all employees, including newcomer young adults, are provided with equal opportunities to gain more hours and experience.
- Keep employee contact information up to date.



Case scenario reflection: Implementing flexible shift scheduling

A restaurant manager is creating a shift schedule for a two-week pay period. The restaurant has two bartenders and only needs one bartender each day. To promote fairness, the manager aims to schedule each employee for the same number of hours over the pay period. After input from the bartenders, they all agree that one bartender will be scheduled for four days one week and three days the next week. The second bartender will have the opposite schedule, with three shifts the first week and four the next. Each will work seven days over two weeks. They are also given the flexibility to swap shifts as needed. This scheduling approach involves employees in the decision-making process, which helps improve fairness and prevent conflicts.

Like the restaurant manager above, consider how you have handled decisions about requests for time off, shift swapping, and other scheduling changes in the past.

Take 10-15 minutes to consider answers to the following questions:

- How will we communicate our flexible approach to shift scheduling with the team?
- How will we make decisions about requests for time off, shift swapping, and other scheduling changes?
- How will we determine the impacts of flexible shift scheduling on employees, customers, and relevant business metrics?



Area of Action 3

Evaluating flexible shift scheduling



Once you have implemented a flexible shift scheduling process, it is important to assess the impact on your team and gather employee feedback. This information can be used to adapt and revise decisions that have been made around flexible shift scheduling.

To evaluate flexible shift scheduling, you can:

Assess impacts

It is important to identify and regularly review indicators to assess the impact of flexible shift scheduling approaches on employees, customers, and the business. An indicator is a sign or signal that shows whether something is going well or not. For example, an indicator of flexible shift scheduling might be employee retention rates before and after implementing flexible shift scheduling.

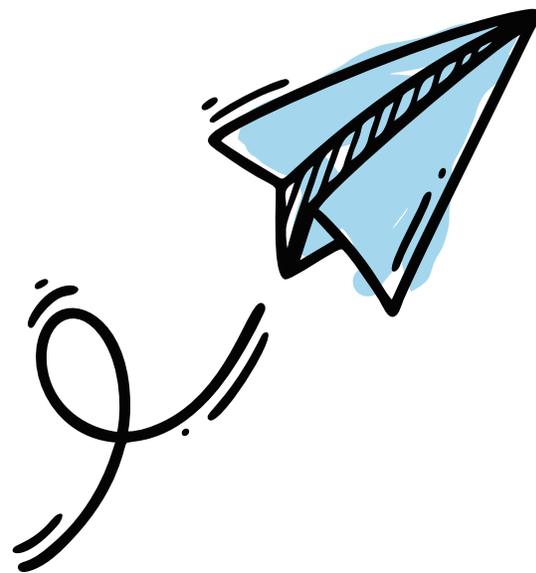
Assessing changes across various indicators can help you make informed adjustments to improve the scheduling process.



Supporting resource: Perplexity, an artificial intelligence search engine, was used to generate a tool in [Appendix 3](#) called “Measures for Reflecting on the Impact of Flexible Shift Scheduling.” This tool can help F&B leaders evaluate the impact of flexible shift scheduling.

* Here are some promising practices:

- Determine the indicators you expect might change by introducing new approaches to shift scheduling. For example:
 - Track how flexible shift scheduling affects employee attendance and retention.
 - Collect and analyze business metrics such as labour costs, sales, operational efficiency, and customer reviews.
 - Consider feedback from employees and colleagues that would indicate the strengths and weaknesses of flexible shift scheduling.



To evaluate flexible shift scheduling, you can:

Gather employee feedback

Periodically check in with employees to determine how the new scheduling approach is working for them and ways that it can be improved.



Supporting resources: The Government of British Columbia outlines [Flexible Work: Post-Implementation Discussion Questions](#) that can be tailored for your discussions.

* Here are some promising practices:

- Gather feedback from staff in several different ways. One-on-one meetings can help you understand individual scheduling needs and preferences. In contrast, regular group staff meetings can provide space to openly and collaboratively discuss flexible shift scheduling, including concerns and ideas.
- Provide employees with anonymous ways to share feedback, such as an anonymous survey or suggestion box.
- Take notes to keep track of ongoing discussions and feedback.
- Review all the gathered feedback to identify common themes and inform decisions.

To evaluate flexible shift scheduling, you can:

Adapt to lessons learned

The most important part of evaluating flexible shift scheduling is to act on employee feedback and business data. This can help improve efficiency and effectiveness by making decisions based on credible information about what is working and what is not. Lessons learned may also be impacted by the effects and considerations of seasonal fluctuations. Successfully implementing flexible shift scheduling will require you to be agile and responsive in different and changing conditions.



* Here are some promising practices:

- Use the information you have gathered to identify what's working well and what could be improved.
- Consider seasonal fluctuations and how staff may be impacted by flexible shift scheduling during changing conditions.
- Adjust scheduling approaches based on lessons learned.
- Communicate with your team about the impacts of flexible shift scheduling and any adjustments being made. Let them know how their feedback influenced the improvements.
- Update flexible shift scheduling policies as needed.
- Stay updated and compliant with labour laws and regulations.

Case scenario reflection: Evaluating flexible shift scheduling

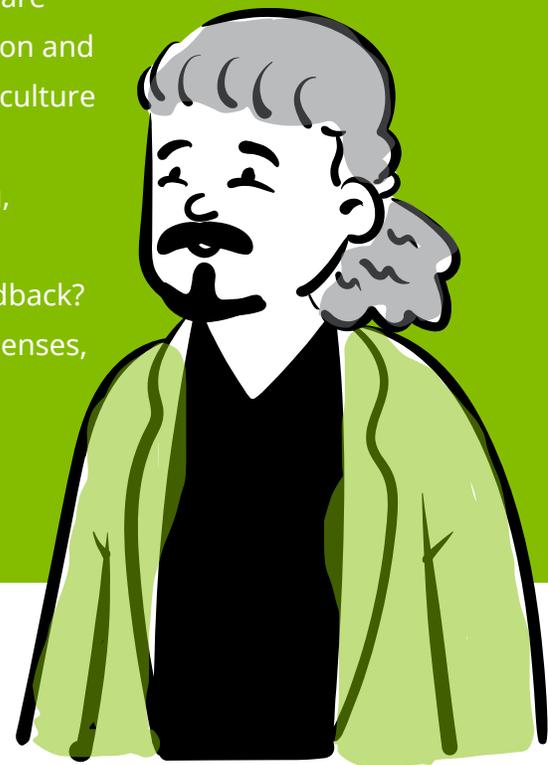
As a newcomer to the company, Moe quickly realized that arriving on time for his shifts was challenging due to the limited public transportation schedule. Moe wasn't the only one facing this issue. Several of his colleagues were also struggling with the same problem. They brought this concern to their manager's attention, hoping for a solution.

To their relief, the manager listened to their feedback and understood the predicament. The manager considered the situation and found that by adjusting the shift start time by just 15 minutes, everyone could arrive on time without disrupting business or customer service needs.

It was encouraging to see that their manager valued their input and was flexible. This small adjustment made a big difference in their daily routine and showed that the company cared about its employees' well-being.

In learning from this case study, consider the following questions. Share these questions with other members of leadership at your organization and brainstorm some responses to support creating a flexible workplace culture like the scenario shared above.

- What have been the impacts on employee satisfaction, well-being, and retention?
- What have been the impacts on customer service quality and feedback?
- What have been the financial impacts, including labour costs, expenses, and overall profitability?
- Given the impacts we've noticed, what should we start, stop, and continue at this time?



Concluding notes

This toolkit provides an overview of what flexible shift scheduling is and why it is important. It identifies challenges that may arise and specific areas of action to consider in planning, implementing, and evaluating flexible shift scheduling to support newcomer young adult well-being and retention.

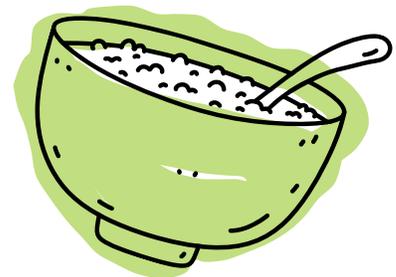
While implementing flexible shift scheduling may bring challenges, it is important to remember the strategies and impacts that flexible shift scheduling can provide for your business. This toolkit provides practical resources and promising practices to help you implement and navigate challenges with flexible shift scheduling over time. By using these tools consistently, patiently, and when you have the capacity, you can witness a transformative impact on employee well-being and a more sustainable workforce by attracting new employees and increasing employee retention.



Appendices

We acknowledge the use of [Perplexity AI](#) to generate the tools provided in these appendices. To generate the tools we entered the following prompts in August 2024:

- * **Appendix 1:** Create a simple document to help food service managers analyze their business demands so that they can plan flexible shift scheduling. Understanding business demands can help them strategically plan work shifts in response to peak hours, seasonal changes, special events, customer preferences, staff preferences, and other business needs.
- * **Appendix 2:** Create a sample flexible shift scheduling policy or guidelines for the food and beverage industry. The policy or guidelines should include:
 - How employees will request time off, including timelines/notice, to allow leaders time to build the schedule.
 - How flexibility will be implemented for each staff role. For example, determine if the same guidelines apply to the head chef and servers.
 - How all employee requests will be considered fairly
 - How decisions will be communicated with employees.
 - Any other important information.
- * **Appendix 3:** We are developing training to support food and beverage establishments in recruiting and retaining newcomer young adults. Our research says that adopting approaches to flexible shift scheduling is important for this group of people. Summarize the most effective ways to observe the impact flexible shift scheduling has on employees and the food and beverage businesses. They should be behaviours that can be observed by managers. Make sure any suggestions or examples are relevant to the food and beverage sector. Each way should be numbered. Use sentences and not bullet points. Keep the descriptions for each of the ways to two short sentences. Follow-up Prompt: Shorten the list to the eight most important ways.



Appendix 1

Analyzing business trends to support flexible shift scheduling

This document is designed to help food and beverage leaders analyze their business demands to plan for flexible shift scheduling. Each section includes a summary outlining its importance. Consider creating your own form or spreadsheet to provide enough space to complete your own business trends analysis.

1.0 Business Overview

Understanding basic business information and operating hours sets the foundation for scheduling. It identifies the time frames that need staffing and any special considerations for different days or holidays.

1.1 Business Information

- Business Name:
- Location:
- Manager Name:
- Contact Information:

1.2 Business Hours

- Weekday Hours:
- Weekend Hours:
- Holiday Hours:

2.0 Peak Hours Analysis

Identifying peak hours and weekly trends helps in scheduling more staff during busy times and fewer staff during slower periods, ensuring efficient use of labour and maintaining customer service quality.

2.1 Daily Peak Hours

- Monday:
- Tuesday:
- Wednesday:
- Thursday:
- Friday:
- Saturday:
- Sunday:

2.2 Weekly Trends

- Most Busy Days:
- Least Busy Days:

3.0 Seasonal Changes

Seasonal changes can significantly affect customer turnout. Understanding these trends allows managers to adjust staffing levels accordingly, ensuring adequate coverage during peak seasons and cost savings during slower periods. Trends you may want to track include, service demand, staffing pressures, and fluctuations in revenue.

3.1 Seasonal Trends

- Winter:
- Spring:
- Summer:
- Fall:

Analyzing business demands continued

4.0 Special Events

Special events can cause sudden spikes in customer volume. Knowing about these events in advance allows for proactive scheduling, ensuring that the business is adequately staffed to handle increased demand.

4.1 Regular Events

- Event Name:
- Date:
- Expected Impact:

4.2 One-Time Events

- Event Name:
- Date:
- Expected Impact:

5.0 Customer Preferences

Understanding customer preferences helps tailor services and staffing to meet their needs, improving customer satisfaction and loyalty.

5.1 Customer Demographics

- Age Group:
- Gender:
- Occupation:
- Other:

5.2 Customer Feedback

- Popular Menu Items:
- Service Preferences:
- Feedback on Wait Times:

6.0 Staff Preferences

Considering staff preferences ensures higher job satisfaction and retention. It helps in creating schedules that align with employees' needs while still meeting business demands.

6.1 Staff Availability

- Preferred Shifts:
- Days Off:
- Part-Time/Full-Time Status:

6.2 Staff Feedback

- Shift Preferences:
- Work-Life Balance:
- Training Needs:

7.0 Action Plan

Reviewing the collected information and creating an action plan ensures that the scheduling strategy is based on evidence. Regular reviews and adjustments help to refine the approach, making it more effective over time. By understanding and addressing each of these factors, managers can ensure efficient staffing meets both customer and staff needs, optimizing operational efficiency.

7.1 Data Summary

- Key Findings:
- Trends Identified:

7.2 Action Plan

- Immediate Actions:
- Short-Term Goals:
- Long-Term Goals:

Appendix 2

Sample flexible shift scheduling policy

This policy aims to balance the needs of our business while providing flexibility for our staff. By following these guidelines, we can create a fair and efficient scheduling process that benefits both the restaurant and our employees. These policies are applicable to all staff, regardless of position.

Time-Off Requests

- Employees must submit time-off requests at least two weeks in advance for regular days off and four weeks in advance for extended leave.
- Requests should be submitted through our scheduling software or in writing to the manager.
- Managers will review and approve or deny requests within three business days.

Fair Consideration of Requests

- All time-off and scheduling requests will be considered on a first-come, first-served basis.
- Managers will strive to accommodate employee preferences while meeting business needs.
- During peak seasons or holidays, limits may be placed on simultaneous time-off requests.
- Employees are encouraged to work together to cover shifts and find replacements when needed.

Role-Specific Flexibility

- Kitchen staff (chefs, cooks, dishwashers):
 - Set schedules with rotating days off.
 - Limited flexibility due to specialized skills and food prep requirements.
 - Can request to swap shifts with similarly skilled coworkers.
- Servers, hosts, and bartenders:
 - More flexible scheduling options available.
 - Can indicate preferred shifts and availability windows.
 - May pick up or release shifts through the scheduling app, subject to manager approval.
- Management roles (general manager, head chef):
 - Expected to work core business hours (insert hours here).
 - Can arrange flexible start or end times with owner approval.
 - Must ensure adequate coverage during all operating hours.

Sample flexible shift scheduling guidelines continued

Communication of Decisions

- Approved schedules will be posted at least one week in advance.
- Employees will receive notifications through the scheduling app or via email.
- Any denied requests or schedule changes will be communicated directly to affected employees, with an explanation provided.

Use of Technology

- We will use scheduling software to streamline the process and reduce errors.
- Employees can access their schedules, request time off, and swap shifts through the app.
- The system will help optimize staffing levels based on historical data and forecasted demand.

Additional Guidelines

- Employees can express interest in picking up extra shifts or reducing hours temporarily.
- An on-call list will be maintained for employees willing to cover last-minute openings.
- Managers will conduct periodic reviews of scheduling practices to ensure fairness and efficiency.
- Employees are responsible for checking the posted schedule and arriving for their assigned shifts on time.
- Managers will ensure staff members of similar roles are cross-trained to support flexibility for scheduling purposes.

Appendix 3

Measures for reflecting on the impact of flexible shift scheduling

Here are the eight most important ways to observe the impact of flexible shift scheduling on employees and food and beverage businesses:

- 1 Monitor employee punctuality and attendance rates.** Managers can track if flexible scheduling leads to reduced tardiness and absenteeism, as employees may find it easier to balance work with personal commitments.
- 2 Assess staff turnover and retention rates.** Observe if there's a decrease in employee resignations and an increase in long-term retention, particularly among newcomer young adult staff members.
- 3 Evaluate customer satisfaction scores and feedback.** Notice if flexible scheduling results in more positive customer experiences, as happier employees often provide better service in food and beverage establishments.
- 4 Measure productivity and efficiency levels.** Look for improvements in task completion times and overall output, as employees working their preferred hours may be more focused and energized.
- 5 Analyze sales performance and revenue.** Track if flexible scheduling leads to increased sales or revenue, possibly due to better coverage during peak hours or improved employee morale.
- 6 Observe team dynamics and collaboration.** Pay attention to whether flexible scheduling enhances communication and teamwork among staff, particularly during shift handovers in restaurant settings.
- 7 Monitor employee engagement and job satisfaction.** Conduct regular check-ins or surveys to gauge if flexible scheduling positively impacts employees' overall happiness and commitment to their roles in the food service industry.
- 8 Assess the quality of food preparation and presentation.** Look for improvements in the consistency and quality of dishes, as well-rested and satisfied employees may take more pride in their culinary work.

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