

## Scheduling Guidelines for Branch Library Services [revised 6/1/16]

### 1.0 General Instructions:

#### 1.1 Preparation of Eight-Week Schedules

Eight-week schedules are to be prepared according to the schedule posted on the intranet. Branch managers should meet with appropriate staff to discuss outreach activities, meetings, programs and school and class visits so that schedules can reflect these activities and are planned for on the branch calendar. Branch staff must be made aware of scheduling deadlines so that they may submit their requests in a timely manner.

#### 1.2 Preparation of Daily Desk Schedules

Daily desk schedules are to be prepared and posted at least two weeks in advance of the actual workweek. Meetings, outreach activities, medical/dental appointments, illness, etc. are to be indicated on the daily desk schedule and on the monthly schedule.

Daily desk schedules shall be adjusted as needed to insure that staff receives full lunch or dinner breaks and their 15-minute break time (one break per four hour work shift).

#### 1.3 Schedule Updating

Eight-week and daily desk schedules should be electronically updated to reflect changes, which should be made in bold face type so that they are readily noticeable. **Schedules must be updated by the agency within 3 days of the end of the pay period.** These updated schedules become the agency's official record of the pay period. The schedules on the network (M-Drive), Form 68s, Night Bonus forms, etc. should match the approved D-Time exactly.

#### 1.4 Schedule Posting

Schedules shall be printed and posted in agency workrooms. Schedules are to be posted no later than two weeks prior to the beginning of the scheduling period. Once the schedule is posted it is to be considered the approved schedule for the 8-week period. However, changes may be made to the schedule, with notice to affected staff, according to branch, employee or management needs.

#### 1.5 Schedule Considerations

Prior to schedule development, staff may submit for consideration requests for preference of days off and other special scheduling needs.

#### 1.6 Employee Schedule Request Forms

Staff shall submit to the Agency Manager special scheduling considerations using the Employee Schedule Request form by the deadline date. The form should be used to address vacations, floating holidays, medical appointments, educational classes, etc.

Staff requests of a recurring nature must be submitted every eight-week period.

Each agency staff member must submit a signed form even if they have no special requests for the scheduling period. Forms are to be submitted three weeks before the schedule is due to be posted in the agency, according to the schedule attached.

Staff will be consulted as necessary regarding these requests, and staff will be notified prior to schedule posting of the status of their Employee Schedule Request. Not all requests may be accommodated.

Request forms will be kept on file at the agency for a period of 1 year.

1.7 Vacations

Agencies shall post an Annual Vacation Planning Calendar in January (December of the previous year) of each year. Staff shall use this document to plan their vacations and floating holidays. All vacation requests are subject to review and approval. When approved, the requisite Form 68 needs to be completed. Staff should indicate their vacation preferences as early as possible in the planning process so that requests can be considered in a timely fashion.

1.8 Advance Planned Vacations

Advance planned vacations may be requested prior to the eight-week scheduling period. Staff should indicate the vacation dates on the agency's Annual Vacation Planning Calendar. All advance-planning requests are subject to review and approval. When approved, the requisite Form 68 needs to be completed. Staff should indicate their vacation preferences as early as possible in the planning process so that requests can be considered in a timely fashion.

1.9 Regular Vacations and Floating Holiday Requests

Regular vacations and/or floating holiday plans should also be indicated by staff on the Employee Schedule Request forms. Staff will be notified as soon as possible but no later than the posting of the eight-week schedule in which the vacations/floating falls if their regular vacation and/or floating holiday request has been approved or disapproved. However, vacations, floating holiday, etc. may still be requested two weeks prior to the date(s) needed.

1.10 Holiday Weekends

The supervisor must make a concerted effort to allow for equitable distribution of holiday weekends.

1.11 Schedule Accommodations for Dependent Care, Medical, Religious Reasons

Staff requests for schedule changes or accommodations due to dependent care, elder care, medical, or religious reasons will be considered in compliance with existing City and Department policies and practices, and should be submitted with accompanying documentation.

1.12 Alternating Attendance at Childrens/YA Meetings

In agencies where there are two childrens' or two young adult librarians, both may be scheduled to attend if no sub is needed. If only one can be scheduled, then staff should alternate to attend the meeting.

**2.0 Schedule Form**

2.1 Excel Template

Weekly and daily schedules are to be prepared using the Excel template provided on the network.

2.2 Staff Listings

Staff will be listed by last name, first initial and identified by their specialty: SL = Senior Librarian, AD = Adult Librarian, YA = Young Adult Librarian, CH = Children's Librarian, PS = Public Service Librarian, LA = Library Assistant, CT = Clerk Typist, MC = Messenger Clerk. Half time staff will be identified by their specialty with the designation (.5) following, e.g. a half time adult librarian is noted as AD (.5). On the Librarian Schedule, the Sr. Librarian is listed first. All other librarians are listed alphabetically after the Sr. Librarian.

On the Clerical Schedule, the Library Assistant is listed first. Administrative Clerks are listed alphabetically after the Library Assistant. Following these listings, the Messenger Clerks are recorded alphabetically.

Substitutes are listed by last name, first initial on the substitute line under the day of the week they are being used. Under their name, indicate the time they are scheduled.

	Sunday	Monday	Tuesday
Substitute:		Smith, A. 10-2	White, B. 4-8

- 2.3 Work Week  
Weekly and daily schedules begin with Sunday and end with Saturday.

### **3.0 Service Hours**

- 3.1 Regional Libraries  
Monday, Wednesday  
Tuesday, Thursday  
Friday, Saturday  
Sunday

10:00 a.m. – 8:00 p.m.  
10:00 a.m. – 8:00 p.m.  
9:30 a.m. – 5:30 p.m.  
1:00 p.m. – 5:00 p.m.

- 3.2 Branch Libraries  
Monday, Wednesday,  
Tuesday, Thursday  
Friday, Saturday  
Sunday

10:00 a.m. – 8:00 p.m.  
12:00 p.m. – 8:00 p.m.  
9:30 a.m. – 5:30 p.m.  
Closed

- 3.3 Robertson Branch Library  
Monday, Wednesday  
Tuesday, Thursday  
Friday  
Saturday  
Sunday

10:00 a.m. – 8:00 p.m.  
12:00 p.m. – 8:00 p.m.  
9:30 a.m. – 5:30 p.m.  
Closed  
1:00 p.m. – 5:00 p.m.

### **4.0 Agency Work Day Schedules**

- 4.1 Agency Shifts  
Agencies shall determine the shifts for the agency (not the individual) as follows:

Day shift: 8:40–5:40 (1 hr. lunch) or 9:10–5:40 (half-hour lunch)  
Night shift: 11:10–8:10 (1 hr. dinner) or 11:40–8:10 (half-hour dinner).

Sunday 12:15-5:15

Agency shifts shall be selected from those identified on the Agency Schedule Profile and submitted to the Area Manager.

## **5.0 Scheduling of Part-Time Staff**

### 5.1 Agency Shifts

The schedule for part-time staff shall fall within agency shifts described in 4.1 above.

Part-time and Substitute staff are required to take a 30-minute unpaid meal break if they are scheduled for over 6 hours; if scheduled for six or less hours they are entitled to one 15-minute break, or at their request, an unpaid 30-minute meal break.

### 5.2 Schedules

For example, part time staff schedules can be:

Four 5-hour days or  
Five 4-hour days or  
Two eight hour days and one 4-hr day or  
Two eight-hour days one week of pay period and three eight hour days the other week of the pay period or  
Two six-hour days and one eight-hour day per week

These are determined by:

1. Agency staffing needs and
2. Employee scheduling requests

### 5.3 Staff Hired for Specific Schedules

Part-time and intermittent employees hired for specific night and weekend schedules are not subject to the scheduling guidelines nor the second night bonus.

## **6.0 Weekly Schedules**

### 6.1 Scheduling Considerations

In making weekly schedules, a concerted effort will be made to provide staff:

Nights: One night per week with a second night on a rotational basis if required by the profile approved for evening service.

Saturdays: No more than 4 Saturdays in an 8 week period.

Sundays: No more than 1 Sunday in a 4 week period

Consecutive days: No more than 6 days in a row

For Sundays, full-time staff works 5 hours but is paid for 8 hours. Part-time staff Works 5 hours and is paid for 5 hours. If vacation or sick time is used for Sunday, full-time staff is charged for eight hours of vacation or sick time. If less than five hours of time are needed, the amount of vacation/sick shall be on

an hour per hour basis for up to two hours, after that it shall be considered a full day.

## **7.0 Daily Desk Schedules**

### **7.1 Considerations**

Staff will be scheduled as needed for appropriate coverage of public service desks. However, staff should not be scheduled for more than 3 hours on a public service desk without a break.

Staff outreach activities ***must*** be indicated on the schedules as shown in the attached sample. Staff should use the Meeting and Outreach Activities planner to identify these plans to the Agency Manager. Staff should make every effort to schedule school visits and other outreach activities during hours the branch is not open to the public. If it is not possible to schedule an outreach activity during non-open hours, and there is not sufficient staff to adequately staff the branch, a substitute may be requested.

Librarians scheduled for school visits or system-wide information meetings should generally be available when necessary for public service desks beginning at 2:00 p.m. on those days. Whenever possible supervisors should allow time for lunch and/or break time after their return.

While there are no official rules, desk schedules should be equitable and fairly distributed for all staff including supervisors, with the standard being up to half of the work shift. In addition, school visits, storytimes, and active presentation of programs shall be considered when assigning public desk time to insure that staff has sufficient time for lunch or dinner and for breaks.

***During off-desk hours, when not at lunch, dinner or on a break, staff is considered to be on-call and available to assist at public desks.***

## **8.0 Substitutes**

### **8.1 Substitute Request Guidelines**

A substitute may be requested, if needed, to fill gaps in the public service schedule created by an absence or vacancy. Generally, substitute help is provided for approximately 50% of the absented employee's time. For example: if a clerk-typist is scheduled for an eight-hour shift and calls in sick, a substitute may be requested for up to four hours of time that day; similarly, 20 hours for a 40 hour absence, etc. If coverage is requested for some other reason (e.g. programming, training, security reasons), branch managers should request the substitute assistance they need.

To meet weekend and evening scheduling guidelines, agencies will be allowed additional substitute time each week if needed. Prior to requesting substitutes, Managers, when formulating the 8-week schedules, shall review the staff available in their agencies and if feasible adjust the schedule accordingly. Once the adjustments have been considered and scheduling gaps become apparent, substitutes may be requested.

Substitute requests should be sent to the Area Office and the M-Drive changes made as soon as the need is known. Area Offices should inform the agencies as soon as a substitute is confirmed or when it is known that no substitutes are available.

## 8.2 Substitutes Use in the Agency

When assigning substitutes, top priority will be given to covering public desks. Substitutes for outreach and training will be provided after all public desks are covered. When assigning substitutes, area offices should first consider as-needed and regular substitute employees for all assignments of 4 hours or more, extra-time employees may be used if no as-needed or substitute employees are available.

Extra-time employees should be considered first if the need is for less than 4 hours of work.

Substitute requests shall be filled in the following order:

1. Substitutes
2. Extra Time
3. Overtime
4. Redeployment

## 9.0 Overtime

- 9.1 If no substitutes or extra-time employees are available, overtime may be requested in order to keep a branch open or to provide coverage and for meal breaks. Requests must be submitted through the chain of command in advance of any overtime being worked, except in emergency situations (i.e. staff must stay beyond closing time because the building cannot be secured). Permission to offer Overtime to provide coverage for a Saturday or Sunday can be requested up to 36 hours in advance of the weekend, after all other options have been exhausted.

## 10.0 Guidelines for Messenger Clerks Staffing the Circulation Desk

Because of our continuing clerical staff shortages and also to prepare staff for promotional opportunities within the department, we have reached an agreement with the clerical union that allows the use of Messenger Clerks on the Circulation desk **ONLY** if the following criteria apply:

- 1) The MC is willing to work the Circulation desk
- 2) The MC has been trained to work the Circulation desk
- 3) The MC is being asked to work the Circulation desk for relief purposes only-- such as to cover a 15-minute break, a lunch, or in a staffing emergency.
- 4) **MCs may be scheduled for a regular shift on the Circulation desk if you have exhausted all other options (Substitute, Extra-Time, Overtime have been offered and no one is available).**

This also applies to 15-hour As-Needed Messenger Clerks. They may be scheduled up to an additional 4 hours per week if needed to cover the desk.

Please be advised that if a Messenger Clerk does not want to work the desk, he/she cannot be forced to do so.

## **11.0 Schedule Access and Maintenance**

### **11.1 Agency and Area Manager Access**

Each branch shall be able to see and change their own schedules only.

Area Managers will be able to review and change schedules of agencies under their supervision only. All such changes must be communicated to the branch as soon as the changes are made.

### **11.2 Retention**

Agencies should archive 6 months worth of schedules on the network.

Agencies should archive 2 years of schedules in hard copy or saved on a flash drive or similar device.