



LARGE OIL REFINERY

Challenge: Determine and Implement the Optimal Shift Schedule in a Union Shop

A large oil refinery was working a very fatiguing, antiquated 8 hour schedule. Many employees were lobbying for change in an attempt to improve both quality time and weekend time off. Further, there was much discussion, controversy, and misinformation about the merits and disadvantages of 12 hour versus 8 hour shifts, with internal surveys illustrating that a slight majority preferred 12 hour shift schedules. This majority increased sharply when age was considered—with the younger employees unanimously preferring a 12 hour shift schedule, while the majority of older shift workers preferred to keep the 8 hour schedule. Management had issues to contend with as well. How were they to attract new employees in a tight labor market when the current shift schedule was looked upon unfavorably by its prospective candidates? And how would they avoid the relief coverage, training, and communication problems that had plagued one of their other refinery's that utilized 12 hour shifts.

Several attempts were made to initiate changes to the current schedule; however, the company was unable to reach consensus in the union environment of the oil refinery. At this point, Circadian Technologies, Inc. (CTI) was contracted as a "subject matter expert" to help facilitate an alternative work schedule and facilitation process. CTI began its win-win process for identifying the optimal shift schedule for the site by forming a task force which then became a communication vehicle for ensuring that all issues were dealt with throughout the process.

CTI worked with the task team to analyze the current schedule and prior change initiatives, and, given the history of controversy over 12 hour shifts, initiated a series of educational sessions to provide factual information on the pros and cons of 8 versus 12 hour shifts. The employees of the oil refinery were then surveyed directly to determine their lifestyle and personal preferences relative to shift scheduling

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“features”. Once these “employee design criteria” were determined, CTI then developed schedules to meet these preferences, within certain boundary parameters previously established by management.

Throughout the process, the employees were updated frequently and asked for their input. The Shift Scheduling Optimization Process (SSOP), as CTI’s process is called, provided an objective and systematic vehicle for the refinery employees to self-select a preferred schedule option from the optimal schedules identified by CTI. By definition, these “optimal” schedules were the one’s that best aligned with the business needs, the employee family/social preferences and that were healthy and safe physiologically. At this point, there was a formal union vote whereby the employees were asked to choose between this current schedule and the preferred option identified in the SSOP process. The preferred option (which turned out to be a long break, 12-hour schedule) was overwhelmingly ratified!

Implementation issues such as vacation pay, holiday pay and overtime coverage were then resolved with input from CTI, and a side-letter agreement with the union was written to accommodate a 12 month trial period. The results of the new schedule was a substantial increase in job satisfaction, and a significant decrease in absenteeism and turnover rates. The change to 12 hour shifts was thus incorporated into the collective agreement during the next contract negotiation period.

This win-win achievement is underscored by the fact that the Union Chairman and the Refinery HR Manager jointly participated in a national seminar conducted by CTI to cooperatively undertake shift scheduling changes and “Maximizing Shiftwork Operations”—concrete testimony to the positive change that can be achieved through a Shift Scheduling Optimization Process that engages both labor and management to achieve a win-win solution.