

Scheduling Practices Toolkit

Strategies to Advance Operator Work Scheduling Practices

Recruiting and retaining a skilled workforce is crucial for any transit agency. [APTA's Transit Workforce Shortage Report](#)¹ highlights that the demanding schedules required of transit workers are a major factor driving them out of the industry. In response, some agencies have begun exploring ways to provide better schedules for their employees.

This toolkit, developed through discussions with transit agencies and a working group of stakeholders, is designed to help agencies assess their scheduling practices and take initial steps toward more effective, workforce-friendly strategies. It organizes key lessons learned with the goal of improving operator quality of life through innovative scheduling solutions that support workforce retention.

How to Use this Toolkit

The toolkit begins with a self-assessment that connects scheduling issues with key aspects of scheduling identified by the working group. The self-assessment groups scheduling practices and issues under four key topics:

- **Building Better Schedules:** Identifying common challenges and pain points in current scheduling practices at your agency.
- **Creating Flexible Workdays or Hours:** Exploring options for more adaptable scheduling to meet the diverse needs of your workforce.
- **Improving Shift Assignment:** Analyzing methods for assigning shifts that balance operational requirements with employee preferences.
- **Communicating with the Workforce:** Emphasizing the importance of clear, consistent, and transparent communication regarding the scheduling at your agency.

To address these issues, we have organized strategies under four comprehensive areas:

- **Scheduling Techniques (S):** Innovative and practical methods to create more efficient and effective schedules.
- **Agency Culture and Morale Strategies (C):** Approaches to foster a positive work environment and enhance employee satisfaction and retention.
- **Planning Strategies (P):** Service planning approaches to ensure sustainable workforce schedule improvements.
- **Technology Solutions (T):** Leveraging modern technology to streamline scheduling processes and improve overall efficiency.

Each strategy category includes a set of suggested performance indicators that agencies can use to pursue solutions.

By focusing on these components and strategies, this toolkit aims to provide agencies with the tools and insights needed to enhance their scheduling practices, improve employee retention, and ultimately deliver better service outcomes.

Shift Assignment		
1. UNDERSTAND YOUR SHIFT ASSIGNMENT ISSUES OR LIMITATIONS	2. UNDERSTAND AND TAKE NOTE OF YOUR PRACTICES	3. IF YOU'RE HAVING THIS ISSUE, SEE STRATEGIES LINKED BELOW
14. SENIORITY At our agency, we want to rethink how we prioritize assignments based on seniority to promote fairness for newer operators who are just starting out.	*Use this space to take note of your agency's practices, similar issues, or barriers within processes at your agency	<ul style="list-style-type: none">S4: Move from Cafeteria-Style Bidding to RosteringC1: Engage with Staff at all Levels
15. BIDDING CHALLENGES Lower seniority operators are finding it increasingly difficult to bid on shifts that comply with legal requirements, such as minimum rest time between shifts.		<ul style="list-style-type: none">S4: Move from Cafeteria-Style Bidding to RosteringT2: Ensure Compliance
16. UNDESIRABLE SHIFTS We want to mitigate the impact of undesirable shifts to improve bus operator retention.		<ul style="list-style-type: none">C4: Invest in Incentive ProgramsC5: Improve Communication and Feedback Channels
17. EQUITABLE SHIFT DISTRIBUTION We want to ensure an equitable distribution of both desirable and undesirable shifts.		<ul style="list-style-type: none">C1: Engage with Staff at all LevelsC2: Foster Collaborative Union
Understand your Issues	Note your Practices	Review Proven Strategies

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Toolkit



Strategies Overview

Scheduling Techniques

S1. Understand Your Runtimes

Analyze historical data to identify time-of-day patterns in trip durations, allowing for more accurate schedules that support on-time performance and operator well-being.

S2. Understand Your Service Demand

Use demand analysis to align service levels with actual ridership patterns throughout the day and week, optimizing resource allocation and reducing operator stress.

S3. Implement Integrated Scheduling for Runcutting

Coordinate vehicle blocking and operator runcutting in tandem to balance vehicle efficiency with more consistent, operator-friendly work shifts.

S4. Move from Cafeteria-Style Bidding to Rostering

Adopt rostering to create structured weekly work packages that improve schedule equity, predictability, and operational efficiency.

Agency Culture and Morale

C1. Engage with Staff at All Levels

Involve employees across departments and roles in the scheduling process to ensure diverse perspectives, improve morale, and build trust in decision-making.

C2. Foster Collaborative Union Engagement

Partner with union representatives early and often to align on scheduling changes, build mutual trust, and support smoother implementation of policies.

C3. Offer Training Opportunities

Provide training for operators and staff to enhance their understanding of scheduling systems, reduce errors, and support professional development.

C4. Invest in Incentive Programs

Use incentives like shift differentials and bonuses to attract operators to less desirable shifts, improving coverage and retention.

C5. Improve Communication and Feedback Channels

Establish clear, two-way communication pathways so operators can voice concerns and influence scheduling decisions, increasing satisfaction and retention.



Planning Strategies

P1. Ensure Adequate Layover Times

Provide sufficient layover time to reduce operator fatigue, improve schedule adherence, and support operator well-being and service reliability.

P2. Improve On-Time Performance

Enhance on-time performance through better scheduling, real-time data adjustments, and bus-priority infrastructure to reduce delays and operator stress.

P3. Optimize Service Frequency and Span

Align service frequency and span with actual demand to create more continuous, predictable shifts and reduce split shifts and overtime.

P4. Streamline Bus Routing

Simplify and standardize routes to minimize detours and runtime variations, improving scheduling efficiency and service consistency.

Technology Solutions

T1. Develop Scenarios

Use advanced planning tools and optimization algorithms to create, compare, and share robust scheduling scenarios for stakeholder input and data-driven decision-making.

T2. Ensure Compliance

Leverage scheduling technology to automatically enforce labor rules, monitor regulatory compliance, and prevent or document violations.

T3. Promote Employee Autonomy

Empower employees with self-service tools to manage their schedules, request time off, and receive real-time updates, reducing administrative burden and improving communication.

T4. Implement Electronic Picking

Streamline and digitize the shift selection process with electronic picking systems that ensure fairness, transparency, and compliance while enabling remote participation.

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