



WORK SCHEDULING STUDY

A PROFILE OF RETAIL
SALES ASSOCIATES IN A
WOMEN'S APPAREL FIRM

*JULIA R. HENLY, PHD
SUSAN J. LAMBERT, PHD*

 THE UNIVERSITY OF
CHICAGO
SCHOOL OF
SOCIAL SERVICE
ADMINISTRATION

SEPTEMBER, 2015



PRINCIPAL INVESTIGATORS, WORK SCHEDULING STUDY

Susan J. Lambert, PhD
Associate Professor, University of Chicago
School of Social Service Administration

Julia R. Henly, PhD
Associate Professor, University of Chicago
School of Social Service Administration

CONTRIBUTORS

Jessica Cardott, BA
Tianna Cervantez, AM
Jessica Manvell Davis, MPP
Ellen Frank-Miller, AM
Peter J. Fugiel, AM
Amanda Janicke, AM
JaeSeung Kim, MSW
Jessi LaChance, AM
Lauren Meadows, BA
Patricia Molloy, AM
Leah Raffanti, AM
Osiris Rojas, AM
Darrah Sipe, AM
Lindsey Whitlock, AM



INTRODUCTION

There are over 4.5 million retail sales workers in the United States and the Bureau of Labor Statistics predicts this number will grow by 10 percent in the next decade.^I Today's retail workers seldom fit the traditional stereotype of a young salesperson with little work experience, choosing part-time employment for extra spending money. Rather, the retail workforce is comprised of people from diverse backgrounds and with a wide-ranging set of interests, goals, and responsibilities. For many individuals, retail work is a career. It can be challenging, engaging, and rewarding. At the same time, the modest pay and scheduling demands on retail employees can make it hard to support a family and juggle important responsibilities such as raising children, going to school, or holding down other jobs.

The University of Chicago Work Scheduling Study (WSS) is a multi-component case study of one national women's retail apparel firm that operates over 800 stores nationwide.^{II} A sample of stores across states in the Midwest, Mid-Atlantic, and Northeast United States were selected to be part of the study. These stores are located in urban and suburban strip malls, discount outlet malls, and large shopping centers featuring big box stores and other retailers.

For distinct parts of the project, WSS researchers examined firm-level administrative data on turnover and retention, store-level payroll and scheduling data on work hours and schedules, conducted a workplace intervention to increase schedule notice, and also conducted in-person interviews and telephone surveys with store employees. Overall, 150 stores and over 600 store managers, assistant managers, sales associates, and other store employees participated in one or more parts of the project over the course of the study. (See next page for an overview of WSS)^{III}

In "A Profile of Retail Sales Associates in a Women's Apparel Firm", we highlight some of the circumstances and experiences of retail employees at this firm, by providing a demographic overview and reporting survey results from 362 part-time and full-time hourly employees in 82 stores that were targeted for inclusion in the experimental component of the study.^{IV} The hourly employees who participated in the survey include assistant managers and sales associates, about two-thirds (64%) of whom worked part-time at the firm. Survey data collected from salaried employees all of whom are store managers, are not included in this report.^V

^I United States Department of Labor, Bureau of Labor Statistics, Occupational Outlook Handbook. <http://www.bls.gov/ooh/sales/retail-sales-workers.htm>

^{II} In order to maintain their confidentiality, neither the company nor its employees are named in publications about this research.

^{III} The Work Scheduling Study would not have been possible without the generous cooperation of the company and its workers who thoughtfully responded to numerous requests from the researchers.

^{IV} The results reported are for all hourly employees who completed a telephone survey during "Wave 1" of the study. Wave 1 surveys were conducted by telephone prior to the implementation of a workplace intervention. Survey responses from participants who only participated in a telephone survey after the workplace intervention component was completed are not included in this report. Telephone interviews were conducted by the University of Wisconsin Survey Center during employees' non-work time. Researchers followed procedures approved by the University of Chicago's Institutional Review Board to ensure that employees felt free to decline or accept participation in the survey and to protect respondents' confidentiality. Respondents received a small cash incentive to compensate them for their time.

^V A report summarizing results of a survey of store managers at this firm can be found here: https://sascholars.uchicago.edu/sites/default/files/work-scheduling-study/files/univ_of_chicago_work_scheduling_manager_report_6_25_0.pdf

**UNIVERSITY OF CHICAGO WORK SCHEDULING STUDY**

A MULTI-COMPONENT CASE STUDY OF A NATIONAL WOMEN'S RETAIL APPAREL FIRM

The University of Chicago Work Scheduling Study (WSS) aims to improve understanding of scheduling practices in hourly retail jobs. The multi-component case study of a national women's retail apparel firm is directed by professors Susan Lambert and Julia Henly, and has received funding from the Russell Sage Foundation, the Ford Foundation, the Annie E. Casey Foundation, and the University of Chicago Center for Health Administration Studies.

The focal firm includes over 800 stores across the United States. Stores vary in size and

location but are typically small (about 10-15 employees) with some presence in downtown urban areas but primarily located in suburban strip malls. Stores typically include one salaried store manager, one hourly full-time assistant manager, and several hourly part-time sales associates. Some stores have more than one assistant manager and a few full-time sales associates.

The focus of the case study is on a sample of stores and their employees in the Midwest and Northeast United States. Study components and data sources include:

- Longitudinal analyses of corporate management information systems to assess employee level and store level turnover and retention and their demographic correlates.
- Longitudinal analyses of payroll data to assess the timing, amount, and variability of employee work hours.
- Manager telephone surveys on staffing and scheduling practices.
- Employee telephone and mail surveys on job characteristics, workplace experiences, personal and family circumstances, and economic and material hardship and well-being.
- A cluster-randomized experiment and process evaluation assessing a workplace intervention designed to increase the predictability of employees' schedules through the provision of greater advance notice of employee work schedules.

More information on each of the study components can be found here:

<https://ssascholars.uchicago.edu/work-scheduling-study/content/experiment-and-data-sources>

A list of project reports, presentations, and papers can be found here:

<http://ssascholars.uchicago.edu/work-scheduling-study/work-scheduling-study-papers>



EMPLOYEES AT THE COMPANY

A DIVERSE WORKFORCE

The typical store has a small and entirely female staff. The gender imbalance of the workforce (only 1 percent of the sample is male) likely reflects the exclusively female branding of the company's merchandise. The workforce is otherwise quite diverse in terms of age, race, and seniority at the company. According to company records on the 82 stores targeted for the survey, almost 51 percent of the sales staff is non-Hispanic White, 30 percent is African American, and 12 percent is Hispanic. Less than 8 percent is Asian, American Indian, Hawaiian Pacific, or multiracial. About 40 percent of employees are 50 years of age or older, while only 15 percent are between the ages of 18 and 24. Overall, the average age of hourly employees in the targeted stores is 42 years. Although 44 percent of employees have been with the company for less than a year, almost one-third (32%) have 3 or more years of seniority and nearly one-fifth (19%) have at least 5 years of seniority. The average hourly employee has approximately 3 years of seniority with the company.

A four-year college education is not generally required for retail sales work, although many retail workers have some post-secondary education. This broader pattern is reflected in the educational credentials of the workers in the sampled stores. Half of the employees who responded to the telephone survey report having at most a high school education, 26 percent of survey respondents report having earned an associate's

degree, 18 percent a bachelor's, and nearly 6 percent report post-graduate education such as a master's degree.

Survey results demonstrate that many employees are juggling other important responsibilities in addition to their job at the company. For example, a considerable number of employees report having caretaking responsibilities. More than one-fifth (21%) report a child living in their household under the age of 18, and 17 percent report providing child care at least once a week for other people's children. Apart from child care, nearly 14 percent of employees also report caring for an elderly, disabled, or ill adult on a weekly basis. Nearly one-third (31%) of employees report working at least one other job. In most cases, these employees have a full-time job on top of their work at the company, suggesting that their retail work may provide a necessary supplement to the income earned at their main job. Overall, 27 percent of full-time employees and 45 percent of part-time employees report that they would prefer to work more hours per week at the company. Over four-fifths (85%) of these employees explain that they are unable to work more hours because their store manager does not have additional hours to assign them.

In addition to second jobs, many employees also report household income from a spouse or partner. Forty-three percent of employees report having a partner they share expenses with,



and 85 percent of these partners work full time. Employees' income is also supplemented in over half (54%) of households by public assistance such as food stamps or Social Security, or by money from family or friends. But even taking all of these sources of income into account, one-fourth (26%) of employees report that it is either extremely difficult or very difficult to live on their total household income, and 40 percent strongly agree or agree that their household income varies a lot from month to month. Only 21 percent of employees report that it is not at all difficult to get by on their current household income, and only a third (34%) report saving money.^{vi}

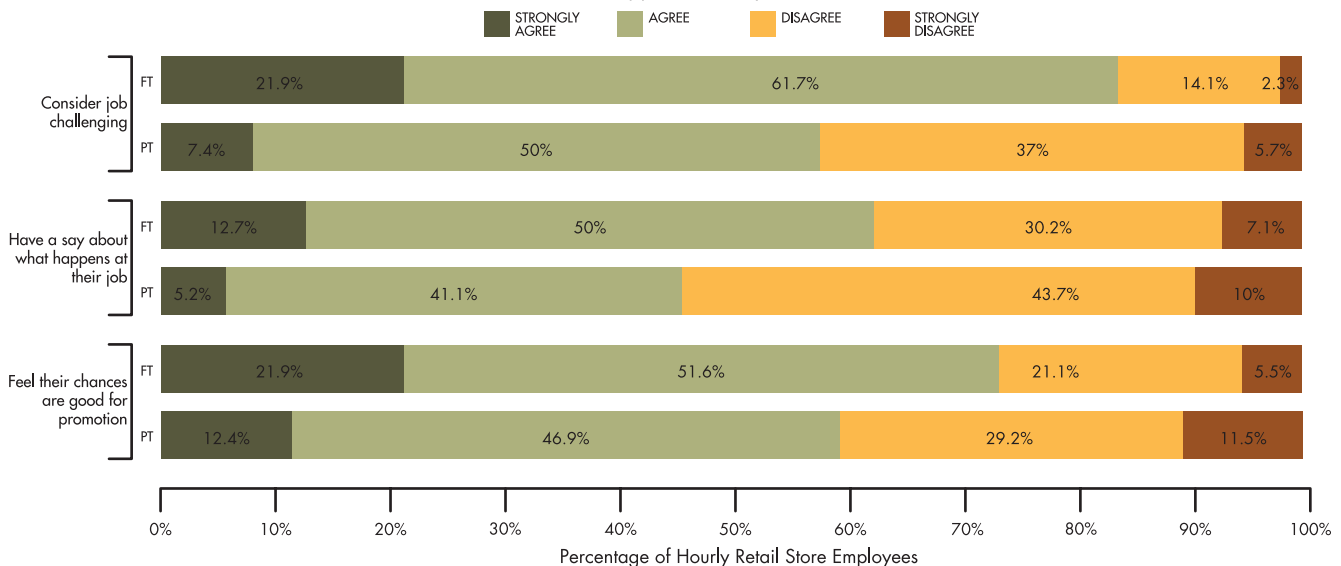
EMPLOYEES' VIEWS OF THEIR JOB AND COWORKERS

Retail jobs in the United States are popularly understood to be simple and to require few skills.

However, the employees surveyed offer a different view of their work. Table 1 below shows the breakdown of responses to survey items about job challenge, job discretion, and promotion chances by full-time (FT) and part-time (PT) status.^{vii}

Two-thirds (67%) of survey respondents describe their jobs as "challenging" and more than three-quarters (77%) disagree with the idea that "anyone could do their job with a little training." As Table 1 indicates, full-time employees are especially likely to call their jobs challenging (84% as compared with 57% among part-time employees). Since most of the full-time employees in our sample are assistant managers, this view may reflect the greater responsibility and pressure that comes with the assistant manager position. Nonetheless, a majority of both part-time and full-time employees – sales associates and assistant managers – find their jobs to be relatively demanding.

TABLE 1: Employees' Views of Job Challenge, Job Discretion, and Promotion Opportunities by Full-Time/Part-Time Status



^{vi} Almost one-fifth of part-time employees report not having health insurance (19.6%), whereas only 6 percent of full-time employees report being without health insurance. Whereas part-time employees with insurance typically are enrolled through a spouse, another job, or a government program, about three-fourths of full-time employees are covered by the firm's health insurance plan.

^{vii} For each of the three items reported in Table 1, the differences between the mean responses of part-time and full-time employees are statistically significant at $p < .01$.



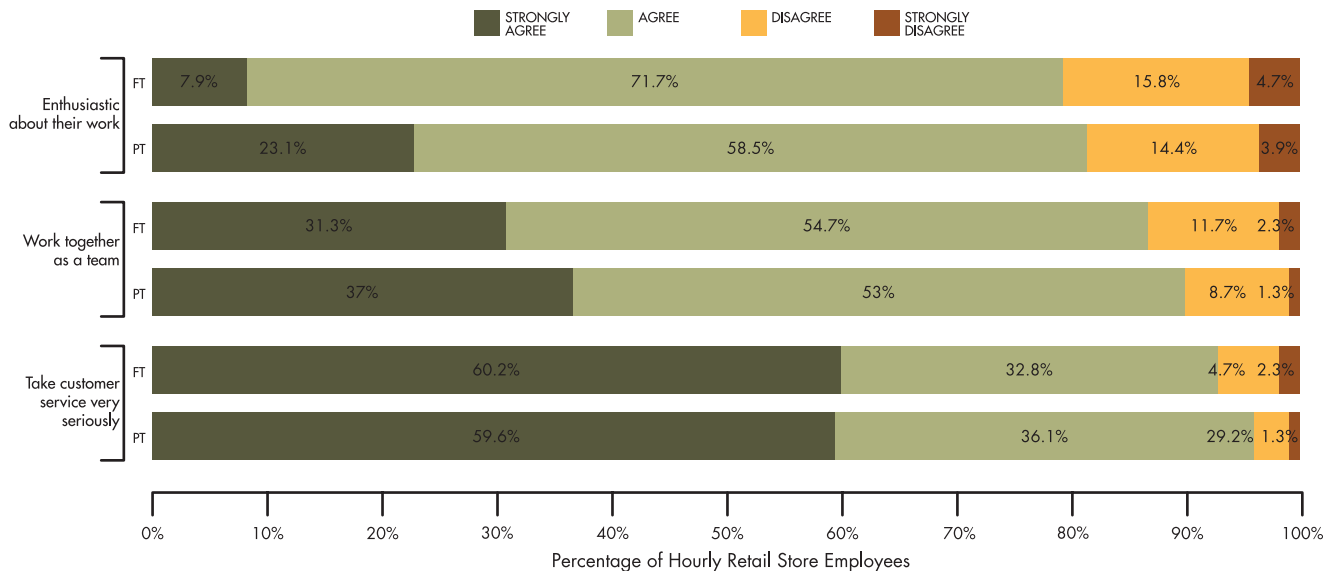
Many employees report that they "have a lot of say about what happens" on their job. This is especially true for full-time employees (63%) as compared with part-time workers (46%). It may be that full-timers, mostly assistant managers, have more of a say because they perform a wider variety of tasks including supervisory functions and have more discretion over when and how to do these tasks than do part-timers.

Retail work is sometimes described as a "dead-end job" with little room for advancement. Yet, despite relatively low earnings, many of the employees surveyed report a different viewpoint. Nearly 3 in 4 full-time employees (73%) and 3 in 5 part-time employees (59%) agree that their chances for promotion at the company are good. Here again the difference between the expectations of full-time and part-time employees may reflect the

greater involvement, responsibility, and opportunities of assistant managers.

Employees report that they and their coworkers are enthusiastic and dedicated to their jobs, as is illustrated in Table 2. Over three-fourths (81%) of respondents either strongly agree or agree that "store employees are enthusiastic about their work" and "employees work together as a team." Part-time workers express even more positive views than full-time workers on both items. It may be that part-timers feel like more of a team because they are more dependent on the knowledge and assistance of their coworkers. Or it could be that the full-timers, who are disproportionately assistant managers in this sample, are less privy to the ways in which part-time sales associates help each other out. The feelings of enthusiasm and dedication that employees report can also be seen in their behavior

TABLE 2: Employees' Views of Enthusiasm, Teamwork, and Customer Service of Store Employees by Full-Time/Part-Time Status





on the job. Most employees say they regularly go above and beyond their job requirements, particularly in terms of customer service. As Table 2 demonstrates, over 90 percent of full-time and part-time employees either strongly agree or agree that sales associates take customer service seriously.^{viii}

SCHEDULE CONFLICT AND SUPPORT

Given the variety of responsibilities employees are juggling in addition to their work at the company, schedule conflicts are a fact of life. However, these conflicts may sometimes be avoided when employees are given greater advance notice of their schedules and when they can count on working the shifts that are posted. As is common practice in the retail industry, employees in this firm received their schedules with limited advance notice and for many employees, changes to the schedule were common and they reported difficulty anticipating the days and times they were expected to work.

As Table 3 illustrates, over three-fourths (78%) of both part-time and full-time employees reported one week or less notice of the days and hours they would need to work. Almost one in five (18%) reported three or fewer days advance notice. About half the sample (47%), and more full-time than part-time employees, disagree with the statement "you can easily anticipate what days and times you'll be working week to week" and over forty percent (45%) of both full- and part-time employees agree "last-minute adjustments are often made to your work schedule during the workweek."

Importantly, as Table 3 illustrates, a subset of employees reported that their schedules were relatively predictable and stable, agreeing that they could anticipate their schedules week to week and disagreeing with the item about frequent schedule changes. A smaller but notable subset of employees also reported that their managers provided them at least two weeks' notice of their schedules, and in some cases even three weeks or more.^{ix} This greater schedule predictability and stability can make it easier to schedule other activities such as a second job, doctors' appointments, and social events with children, family members, and friends.^x

Perhaps because most employees reported that their schedules were made with limited advance notice, it was relatively common for them to also report conflicts at least some of the time between their work schedule and life outside of their job. Table 4 shows that full-time workers experienced more frequent conflicts as compared to part-time workers.^{xi} For example, over half (52%) of full-time workers compared to just under two in five (37%) part-time workers report that their work schedule made it difficult for them to fulfill personal or family responsibilities at least some of the time and that things at home did not get done because of work demands (54% full-time; 39% part-time). Well over half of both groups reported that they had to change their plans due to work-related duties at least some of the time (71% full-time; 59% part-time). More than one-fifth (21%) of full-time workers reported they had to change their plans due to work-

^{viii} In Table 2, the differences between the mean responses of part-time and full-time employees for the item regarding enthusiasm for work is statistically significant at $p < .05$. The differences between responses of part-time and full-time employees for the remaining two items in Table 2 are not statistically significant.

^{ix} One component of the University of Chicago Work Scheduling Study was a workplace intervention in which store managers were encouraged to post schedules up to four weeks at a time rather than only one week as was common practice. The survey responses reported here were collected prior to the intervention, and show that some managers were already giving employees greater than one week advance notice. The intervention results confirm that greater advance notice is a feasible scheduling practice for managers in this firm. The managers who were asked to post more than one week at a time did so, averaging more than two weeks at a time throughout the intervention as compared to just a little over one week on average for the comparison group. (Intervention results available from authors by request.)



TABLE 3: Predictability of Work Schedules by Full-Time/Part-Time Status

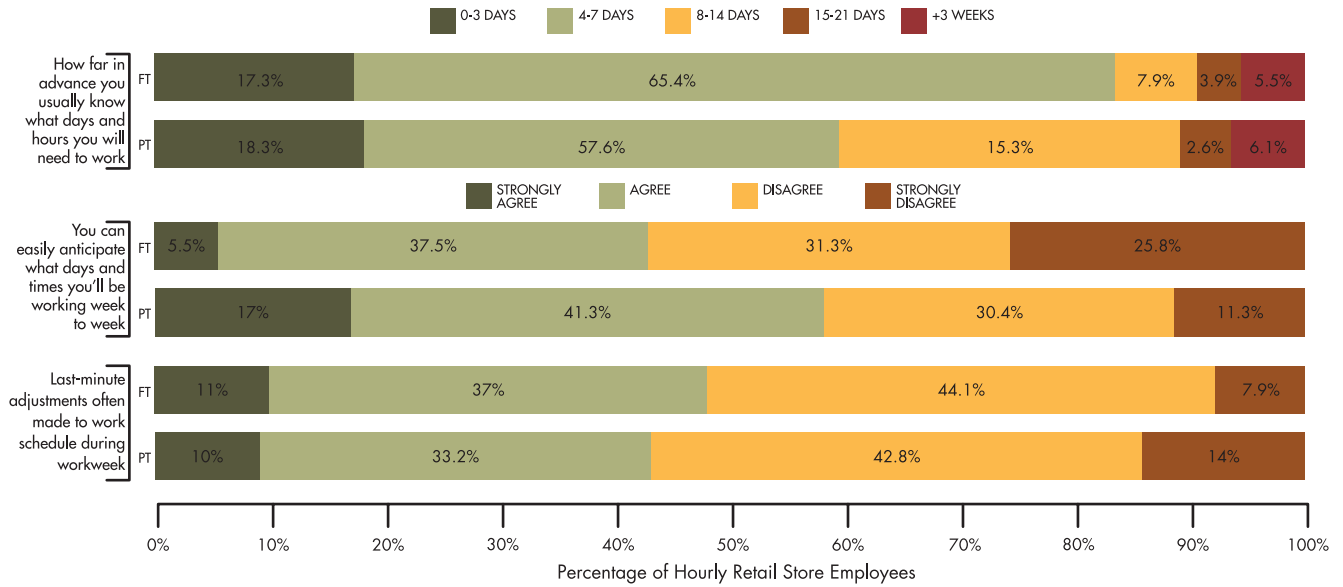
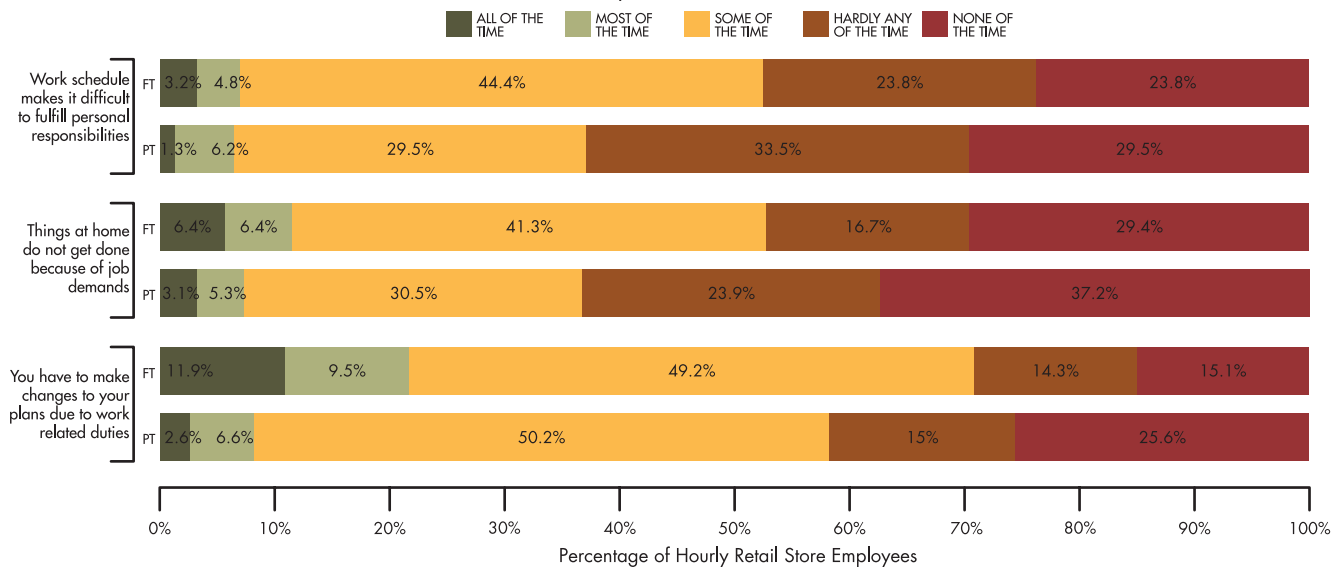


TABLE 4: Conflicts between Work and Non-Work Activities by Full-Time/Part-Time Status



^X In Table 3, the differences between the mean responses of part-time and full-time employees for the item regarding anticipation of the days and times of work is statistically significant at $p < .01$. The differences between responses of part-time and full-time employees for the remaining two items in Table 3 are not statistically significant.

^{XI} For each of the three items reported in Table 4, the differences between the mean responses of part-time and full-time employees are statistically significant at $p < .05$.



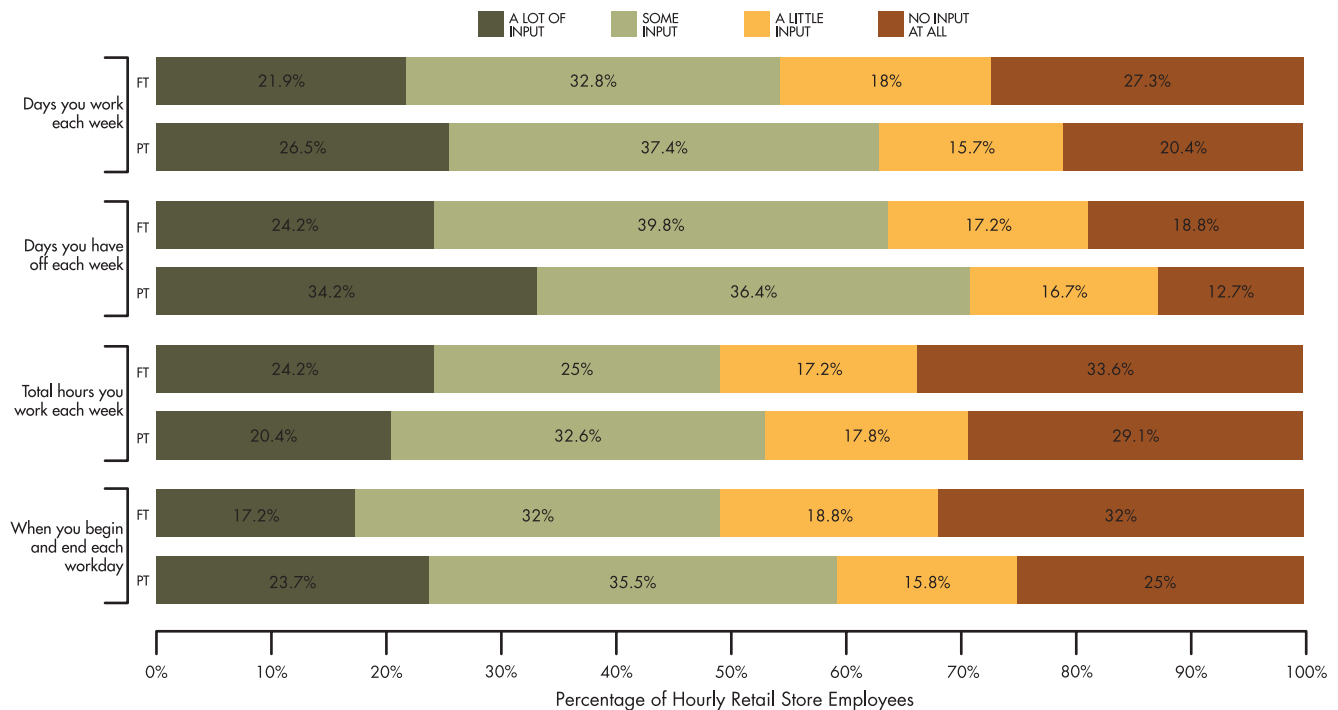
related duties most or all of the time. These conflicts can be reduced if employees are given input into the days they work and the days they have off each week, the number of hours they work, and when they begin and end each workday.

The survey results reported in Table 5 show a great deal of variation across employees in several different kinds of schedule input. Overall, approximately one-half of full-time and part-time employees reported having at least some input into the days they have off and the days they work, the number of hours they work, and when they begin and end their work days; however, between one-fifth and one-third report no input into their schedules. As Table 5 demonstrates, it is somewhat

more common to have input into days off than the days actually worked, the number of hours worked, and starting and ending times of the workday. Full-time workers have somewhat less input than part-time workers across each of these types of schedule input.^{xii}

Employees report that managers at this company are supportive when work-family scheduling challenges arise. As Table 6 shows, almost 9 out of 10 (88%) employees agreed that their manager would be understanding if they were to have a personal or family problem that interfered with work. The vast majority of employees also report that they would feel comfortable talking with their manager about conflicts between work and

TABLE 5: Employee Input Into Work Schedule by Full-Time/Part-Time Status



^{xii} In Table 5, the differences between the mean responses of part-time and full-time employees for the items regarding input into days of work and starting and ending times of work are marginally significant at $p < .10$; the difference between the mean responses of part-time and full-time employees for the item regarding input into days off is statistically significant at $p < .05$; and there is no statistically significant difference between the mean responses of part-time and full-time employees for input into number of hours.

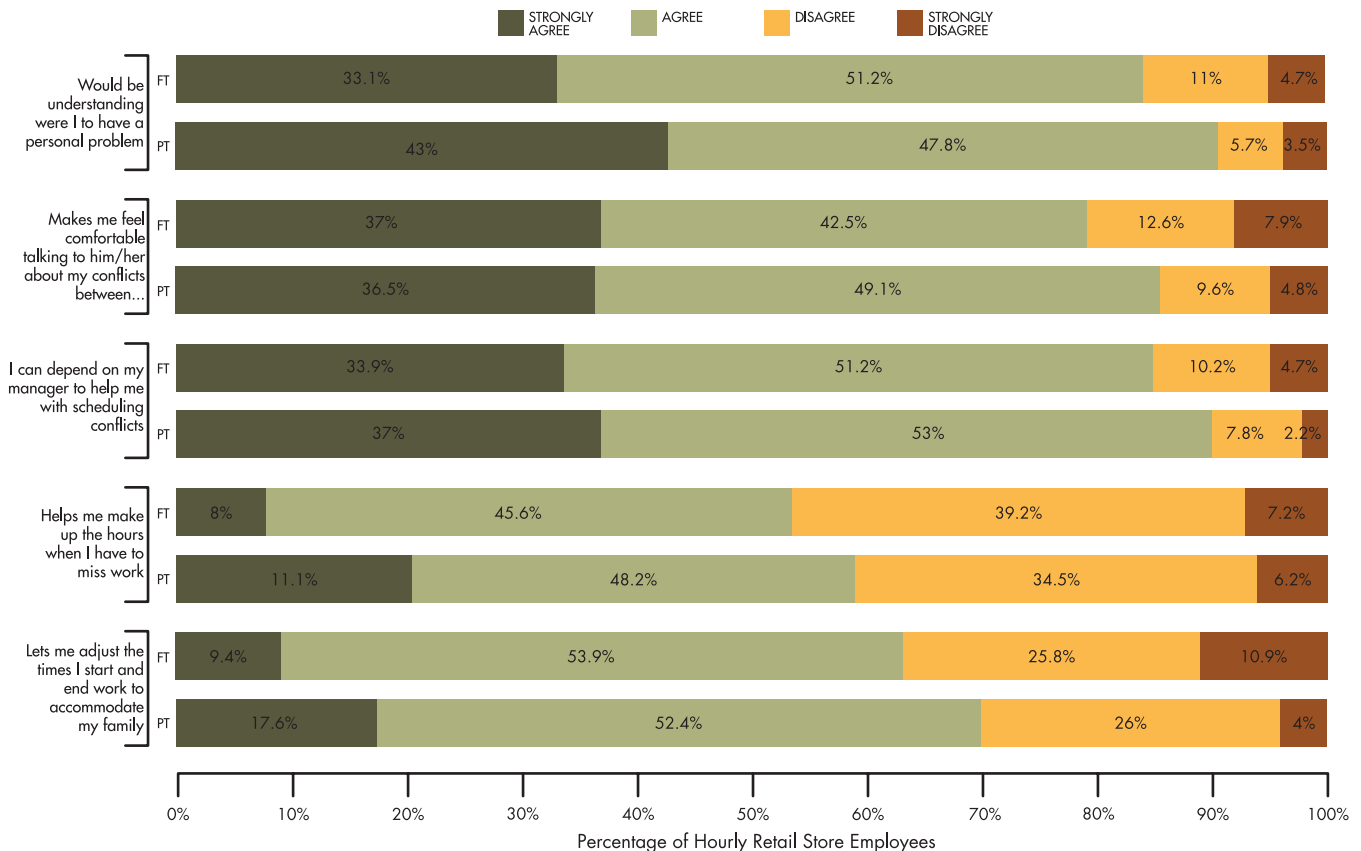


non-work obligations (83%) and agree that they can depend on their manager to help with scheduling conflicts (88%). The majority of employees also agree that their manager helps them make up hours missed (57%) or allows them to adjust starting and ending times to accommodate family and personal needs (68%), although both of these items receive less agreement than the other forms of manager support for work-life scheduling conflicts. Overall part-time employees report somewhat more agreement than full-time employees across the five items, however the differences are small.^{xiii}

Like many retailers, the company sets limits on the number of hours that managers can schedule

their employees in a certain period. Managers may be reluctant to make schedule changes requested by employees because they are concerned about how it will affect the payroll hours of the store as a whole. In most cases, employees report their coworkers help one another deal with scheduling conflicts, for example by switching shifts with one another or taking over a coworker's hours in the event of a conflict. In this way, coworker support can reduce scheduling challenges without interfering with the manager's hour limits and, indeed, without much manager involvement at all. Overall, the fact that most employees are able to work with managers and coworkers to make changes to their schedules

TABLE 6: Employees' Views of Manager Support of Work-Like Scheduling Challenges



^{xiii} In Table 6, the differences between the mean responses of part-time and full-time employees for the items regarding the manager being understanding about a personal or family problem interfering with work and the manager being willing to adjust starting and ending times to accommodate family or personal needs are statistically significant at $p < .05$; the mean differences between part-time and full-time employee responses are not statistically significant for the remaining three items.



when necessary suggests that there is genuine support within the company for employees' desire to balance work and personal life.

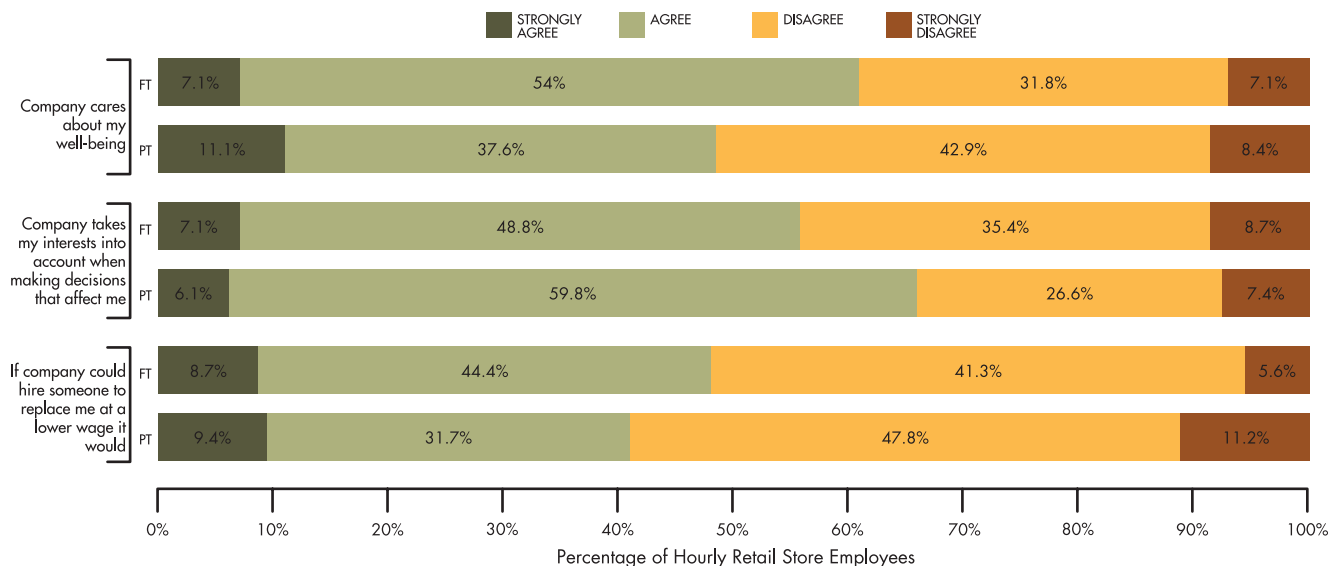
EMPLOYEES' VIEWS OF THE COMPANY AND THEIR FUTURE TOGETHER.

The majority of the respondents to the employee survey express a positive view of the company. As Table 7 illustrates, over half (61%) of full-time employees and almost half (49%) of part-time employees report agreement that the company cares about their well-being. The majority of employees (62%) are also in agreement that the company takes their interests into account when making decisions that affect them (66% part-time; 56% full-time). Nevertheless, a substantial subgroup of employees surveyed did not agree with these two statements, suggesting some disaffection for

the company among its sales staff. This less positive view is also reflected in a question related to the company's business interests. Over half of full-time employees (53%) and two in five of part-time employees (41%) agree that the company would hire someone to replace them at a lower wage if it could.^{xiv}

As Table 8 illustrates, four-fifths of full-time employees (80%) and almost three-fourths of part-time employees (73%) report agreement that they would like to be working for the company a year from the survey date. This finding is underscored in employee responses to a number of additional questions addressing their anticipated future with the company. Over two-thirds of employees report that they disagree or strongly disagree with an item asking whether they thought frequently about leaving the company (68% full-time; 74% part-time) or that

TABLE 7: Employees' Views of Support from Company

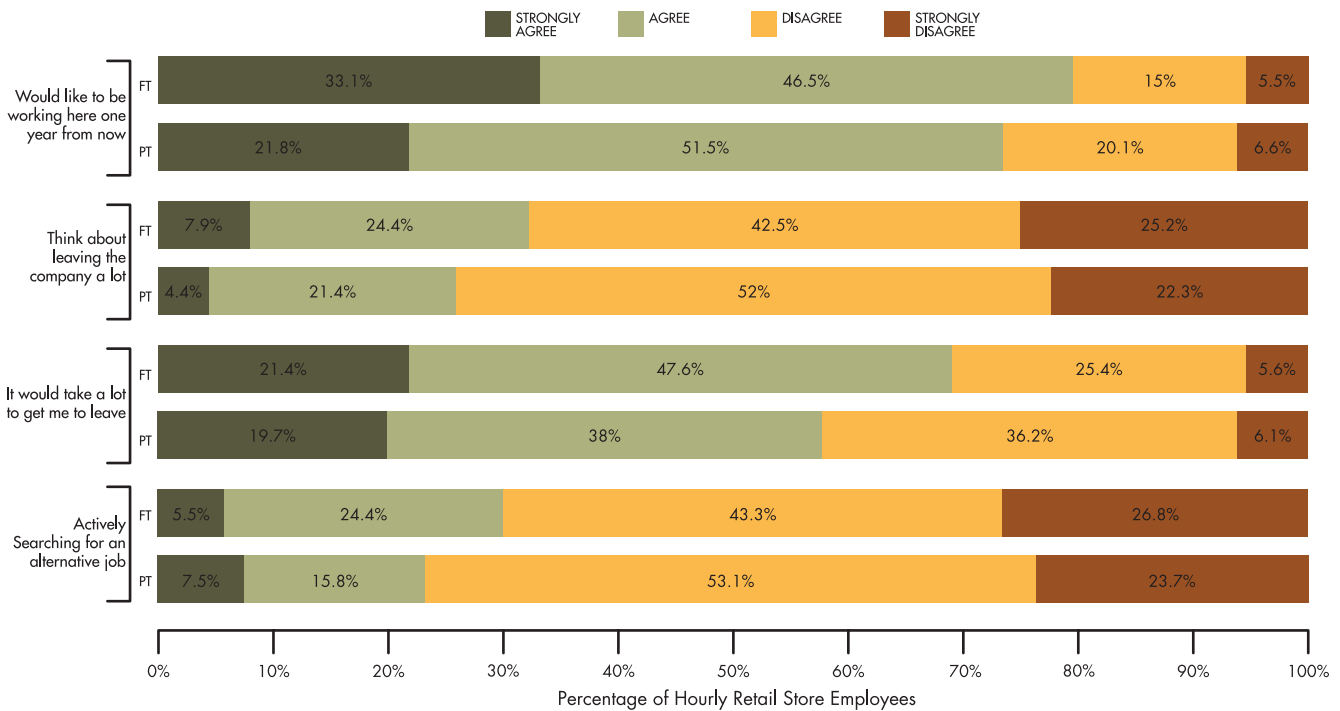


^{xiv} In Table 7, the differences between the mean responses of part-time and full-time employees are only statistically significant for the item asking whether respondents believe the company would replace them for someone with a lower wage (at $p < .05$); the mean responses of the remaining two items are not statistically significantly different between part-time and full-time employees.



they were actively looking for an alternative job (70% full-time; 77% part-time). A similarly large percentage of full-time employees report that it would take a lot for them to leave the company (69%). Part-time employees are more varied in their responses to this question with two in five (42%) reporting that they disagree or strongly disagree with the statement that it would take a lot for them to leave the company.^{xv}

TABLE 8: Anticipated Future with the Company



^{xv} In Table 8, the differences between the mean responses of part-time and full-time employees are only statistically significant for the item asking whether respondents would like to be working at the company in a year ($p < .05$); the mean responses of the remaining three items are not statistically significantly different between part-time and full-time employees.



CONCLUSION

The University of Chicago Work Scheduling Study is a multi-component research project designed to increase knowledge of the nature and ramifications of scheduling practices and other working conditions in the retail workplace through a focused case study of one firm. Results from telephone surveys with hourly workers employed by the retail apparel chain give voice to the perceptions and experiences of retail sales associates and assistant managers.

On the one hand, the employees interviewed in the study express several concerns about their jobs. Most report limited advance notice of their work schedules, and for many employees, fluctuating hours, schedule changes and difficulty anticipating work hours are common occurrences. Unpredictable and variable work hours such as these can not only interfere with successfully meeting responsibilities outside of work but can also contribute to difficulties at work and undesired turnover.^{xvi} Moreover, the wages paid

to hourly employees at this firm coupled with low and variable hours contribute to economic hardship for many employees. A quarter of the retail sales associates in the survey sample report difficulty living on their household income and only a third report saving money, despite being employed, in some cases in multiple jobs.

These challenges notwithstanding, the vast majority of employees in this diverse workforce report being highly engaged and enthusiastic about their work and express a strong commitment to their employer, their coworkers, and their customer base. Such a committed workforce is a valuable asset for the firm. To reduce the costs associated with negative job conditions and further increase the value of employees to the firm, it may be fruitful to invest in improved compensation and scheduling practices, both of which present serious challenges to what is otherwise described as a largely positive work experience.

^{xvi} See Henly, J.R. & Lambert, S. (2014). Unpredictable work timing in retail jobs: Implications for employee work-life outcomes. *Industrial and Labor Relations Review*, 67(3), 986-1016.; Lambert, S.J & Henly, J.R. (2012). Frontline managers matter: Labour flexibility practices and sustained employment in hourly retail jobs in the U.S. In Chris Warhurst, Françoise Carré, Patricia Findlay, and Chris Tilly, eds., *Are Bad Jobs Inevitable? Trends, Determinants and Responses to Job Quality in the Twenty-First Century*. England: Palgrave Macmillan, pp.143-159.