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# Best Practice Rostering Folder

A component of the RosterCoster Best  
Practice (BP) Rostering Framework



### **Why a Best Practice Rostering Folder?**

Without going into detail, a Best Practice Rostering Folder allows you to summarise your rostering planning and review in a single, medium-sized folder. We say 'medium-sized', because we do not suggest that you insert a copy of every operational roster you will ever write (we offer, for example, software packages that can hold all this information). Rather, use it as an overview of your rostering, and for your internal marketing, as well.

### **How do I go about this?**

You can either use the content of this document to create your own folder, or get us to work one up for you, with our compliments (bulk orders with content tailored to your local needs available at cost, by request). To order, simply send an email to [RosterCoster@gmail.com](mailto:RosterCoster@gmail.com). We will then post you out a copy (white gloss, plus the content of this document typed onto the folder inserts, as a guide to the sorts of things that you can add under each of the inserts).

### **Where does RosterCoster fit in?**

Obviously we hope that this folder may lead you to use some of our services, such as our online rostering at [www.RosterCoster.com](http://www.RosterCoster.com). You will find an invitation to this effect on each insert. But whether you do or not, we are committed to promoting best practice rostering in the sector as a whole. And the more all of us do things well, the more we all win, one way or another, in the end. And that's what we mean by 'best practice'.

### **Enquiries regarding the layout of this folder, or the broader RosterCoster Best Practice (BP) Rostering Framework**

Claude Alain Staub	0433 888 889; or
Damien Ryan-Green	0438 388 922.



# Introduction

This folder is a component of the broader BP Rostering Framework as seen at [www.RosterCoster.com](http://www.RosterCoster.com). This framework includes software, but even if you do not use our software, please feel free to talk to us about the benefits of using this folder, nevertheless.

The folder is primarily about keeping your rosters process summarised neatly in one place, in a readily accessible way. But it is also about your internal marketing: it is a real benefit to be able to present to anyone, whether CEO or staff member, a very nicely formatted summary of what you do, in a layout that is genuine best practice, tested against multiple organisations in your sector. Essentially, the process described below constitutes a rosters planning and review cycle:

- Your "client need" Greenfield Rosters drive your "annually projected" Core Rosters, which in turn drive your fortnightly "start of fortnight" Posted Rosters, which in turn drive your fortnightly "end of fortnight" Worked Rosters.
- Then, in turn, the reality of your Worked Rosters might lead you to review your Posted Rosters, which in turn might lead you to review your Core Rosters, which might in turn lead you to review your Greenfield Rosters, which might in turn lead you to apply for a review of your Allocation.

## Executive Summary

Hand in hand with the above cycle, which implies a suggestion that an org is under- or over-allocated, is that there are things that coal face managers and staff must be doing to stay under budget, while of course delivering quality client outcomes (in most rosters discussions, which tend to be budget and process focused, this latter point is a given - quality service delivery is our job). This means performance management:

- Any gap between your "client need" Greenfield Rosters and your "annually projected" Core Rosters provides opportunities to performance manage that gap, and perhaps create initiatives to reduce the cost of your Core Rosters.
- Any gap between your "annually projected" Core Rosters and your Posted and Worked Rosters provides opportunities to performance manage that gap, in turn, by creating initiatives to reduce any coal face issues that are causing your actual rosters to run higher than your planned rosters.



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# Our Allocation

Your organisation (org) will most likely have an allocation based on some assessment of need back when your organisation was still, let's say, a "greenfield" (that is, an empty block of land, buildings not yet built, and so far no staff hired)

## Case Study

*Org "W" engaged us to assist it to develop its Greenfield Roster (see below) before it opened, and used this to set its allocation.*

*In such a case, "Our Allocation" and "Our Greenfield Roster" match.*

*In all other cases, the Greenfield Roster can be used as evidence that the allocation is perhaps wrong.*



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# Our Greenfield Rosters

This roster is based on the RosterCoster Assessment of Rostering Need, which creates a Greenfield Roster and Costing, where that costing includes an allowance for overheads such as management and operating.

## Frequently Asked Questions

### **Is this an output based funding model?**

Client need is sole driver for Greenfield Roster and Costing. As such, this is an OUTPUT based funding model, and not an INPUT based funding model, even though the word "roster", which is usually associated with inputs, happens to be included in the title. (If you or your funding body would like to further discuss this logic, we are on hand to support the logic. We are actively promoting this as a very competitive output based funding model in the sector that is less 'broad brush estimation' than others, and which can also be readily maintained 'live and online', and not fall out of date almost as soon as an assessor has walked out of an accommodation setting.)

### **Where to next with our Greenfield Rosters?**

Almost all organisations 'have' Greenfield Rosters. It's just that usually, they are informal. Most likely, they are no more than an idea in a line manager's head about the 'ideal' roster he or she would put in place, given half the chance. We recommend you get that roster on paper, and cost it, as a modelling exercise and as a reference. You may never get to implement it, but at least, 'have it'. Then, you have a baseline, against which you can rate your real rosters (see below): is your real roster 5% above ideal (excellent) or 20% above ideal (poor)?

RosterCoster has automated processes that can assist you to manage your Greenfield Rosters. If you would like to formalise your Greenfield Rosters within this framework, contact Claude Staub on 0433 888 889 or Damien Ryan-Green on 0438 388 922.



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# Our Core Rosters

In June each year, a Core Roster (in many orgs, this is called a "Projected Roster", and in others, it's called a "Base Roster") for the coming financial year is inserted.

This Core Roster should differ from your Greenfield Roster ONLY if atypical client and / or staff needs apply to the coming financial year

## Frequently Asked Questions

### **But what if our core roster costing is higher than our allocation?**

Then you have gone over-budget even before the year has started. But at least you know this, and at the end of the year, you can challenge any assertion that coal face management is to blame. Rather, you can assert that the budget over-run was due to known (and indeed) structural problems, and you can start to think about whether the Greenfield Roster and even the Allocation needs to be reviewed (this would usually apply only if a "Core Roster" was above the "Greenfield Roster" for three years in a row).

### **Where to next with our Core Rosters?**

Almost all organisations 'have' Core Rosters. It's just that sometimes, they are not rigorously costed each June, and then logged for comparison against actual expenditure throughout the year (n.b. Core Roster costings are NOT your allocations! Core Rosters are what you predict you will spend in the coming year, regardless of your allocations. In short, they tell you how much you were under or over budget even before the financial year started).

RosterCoster has automated processes that can assist you to manage your Core Rosters. If you would like to formalise your Core Rosters within this framework, contact Claude Staub on 0433 888 889 or Damien Ryan-Green on 0438 388 922.



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# Our Posted Rosters

Before the start of each fortnight, a Posted Roster (most staff refer to this simply as "the roster"), the roster that will apply for the coming fortnight is posted out to staff, and ends up "on the fridge", so to speak.

If you happen to create your posted rosters in Microsoft Excel, either in your own format or ours, speak to us about whether you would like this posted roster to automatically export to [www.RosterCoster.com](http://www.RosterCoster.com), ready for shift replacement (see "Our Worked Rosters", above).

## Frequently Asked Questions

### **Where to next with our Posted Rosters?**

RosterCoster has automated processes that can assist you to develop your Posted Rosters. If you would like to formalise your Posted Rosters within this framework, contact Claude Staub on 0433 888 889 or Damien Ryan-Green on 0438 388 922).



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# Our Worked Rosters

In most organisations, the Worked Roster is recorded in the form of a large batch of paper-based timesheets each fortnight, and then some (usually not enough) of this information is then manually coded by payroll staff into a payroll system.

We recommend that Worked Rosters be logged online at the coal face via [www.RosterCoster.com](http://www.RosterCoster.com). This is less difficult than it sounds, because the only shifts that need to be logged are the shift VARIATIONS: the rostered shifts appear in there automatically, uploaded before the fortnight even starts from pre-prepared Posted Rosters (see "Our Posted Rosters", above)

## Frequently Asked Questions

### **Can these worked rosters be exported into our payroll system?**

Yes, please feel free to contact us about how to go about that. It's essentially a risk management project in its own right that must be taken seriously: it is this step that is most often done badly (case study: Google "Queensland Health Payroll Disaster"). Hand in hand with this is the fact that a key element to be risk managed is the fact that half of the equation is outside our control. A shift exported by us must be imported by your payroll system with a guarantee of timeliness and accuracy, and even though this is not technically our issue, we all benefit if we all get it right, and we all suffer damage if ANY of us doesn't.

### **Where to next with our Worked Rosters?**

RosterCoster has automated processes that can assist you with your Worked Rosters, in particular, management of these via our online rostering site [www.RosterCoster.com](http://www.RosterCoster.com). If you would like to formalise your Worked Rosters within this framework, contact Claude Staub on 0433 888 889 or Damien Ryan-Green on 0438 388 922).





# Performance Management

Essentially, the process described in the previous inserts constitutes a gap analysis:

- Any gap between your "client need" Greenfield Rosters and your "annually projected" Core Rosters provides opportunities to performance manage that gap, and perhaps create initiatives to reduce the cost of your Core Rosters.
- Any gap between your "annually projected" Core Rosters and your Posted and Worked Rosters provides opportunities to performance manage that gap, in turn, by creating initiatives to reduce any coal face issues that are causing your actual rosters to run higher than your planned rosters.

At the coal face, gap analysis is an extraordinarily powerful tool, and is pretty much as easy to "do" as to "not do" (the standard metaphor being "eating apples" everyone knows it's a good idea and very easy to do, and yet some people do it, and some people don't). Examples of areas that can benefit from gap analysis include:

- Job Profiles v Staff Profiles: is there a gap in terms of qualifications, experience, or even "staff count" (comment: staff count applies to an optimal-sized casual pool, too, something that online rostering at [www.RosterCoster.com](http://www.RosterCoster.com) lets you check, at a glance, live and online)
- Supervision & support to reduce gaps between org expectations and service delivery
- Training to reduce gaps between org expectations and service delivery (this is targeted training within the context of rostering: our standard metaphor is antibiotics: many orgs carry out 'broad spectrum training', whereas gap analysis allows you to carry out 'narrow spectrum training'. Further, training need identified live and online allows you to know how many training courses you need to book in, and how many you don't, based on the gaps between Job Profiles v Staff Profiles)
- There are many others, for example: Succession Plan to Fill Gaps; Recruit to Fill Gaps; Manage OH&S to Minimise Gaps.

## Frequently Asked Questions

### Where to next with our Performance Management?

Using the information collected under the foregoing inserts to improve Performance Management is pretty much the whole point. Otherwise, you simply get very good at measuring how badly you are going without actually doing anything about it. If you would like to formalise your Performance Management within a RosterCoster framework, contact Claude Staub on 0433 888 889 or Damien Ryan-Green on 0438 388 922).