SOP: Shift Planning and Roster Creation Procedures

This SOP defines the process for **shift planning and roster creation procedures**, encompassing staff availability assessment, workload allocation, shift scheduling, leave management, and communication of rosters. The goal is to ensure efficient workforce management, maintain operational continuity, and optimize employee satisfaction by creating fair and balanced work schedules.

1. Scope

This procedure applies to all departments and staff involved in shift-based work schedules.

2. Responsibility

- **Supervisors/Managers:** Oversee and implement shift planning and roster creation.
- **HR Department:** Maintain records of staff availability, leave, and compliance with labor laws.
- **All Staff:** Provide up-to-date availability and request leave as per policy.

3. Procedure

1. **Assess Staff Availability**
   - Collect updated availability from all staff (including restrictions, preferences, and any temporary limitations).
   - Review contractual obligations and labor law compliance (rest periods, maximum weekly hours, etc.).

2. **Workload Analysis & Allocation**
   - Determine operational requirements for each shift based on workload forecasts and minimum staffing levels.
   - Allocate shift requirements by matching staff skills and experience.

3. **Shift Scheduling & Roster Drafting**
   - Prepare a draft roster, ensuring fair and balanced distribution of shifts, overtime, and undesirable hours.
   - Prioritize requests for leave and personal constraints as feasible.

4. **Leave & Absence Management**
   - Update the roster with approved leaves and manage conflicts or gaps by arranging relief staff or swaps.
   - Maintain records of all approved leaves and adjust the roster as needed.

5. **Roster Approval & Communication**
   - Submit the draft roster to management for review and approval.
   - Publish the approved roster to all relevant staff at least [X] days in advance via email, noticeboard, or scheduling software.

6. **Feedback & Adjustments**
   - Address staff feedback on the published roster within [Y] days.
   - Amend roster as necessary and communicate any changes promptly to all affected staff.

4. Documentation

- Staff availability forms
- Approved leave records
- Published rosters and any amendments

5. Review and Continuous Improvement

- Conduct periodic audits of shift planning effectiveness and employee satisfaction.
- Update procedures in response to identified issues or changes in regulations.

6. References

- Company Shift Policy
- Applicable Labor Laws
- HR Leave Management Policy