

# SOP: Weekly Shift Planning and Assignment Procedures

This SOP details the **weekly shift planning and assignment procedures**, covering the systematic approach to scheduling employee shifts, allocating resources efficiently, managing shift rotations, addressing employee availability, and ensuring smooth operational continuity. The objective is to optimize workforce productivity, maintain balanced workloads, and meet organizational demands through organized and transparent shift management practices.

## 1. Purpose

To establish a standardized process for assigning and managing weekly employee shifts, ensuring fair distribution of workload and operational efficiency.

## 2. Scope

This procedure applies to all departments responsible for shift-based operations and all employees scheduled for rotating or fixed shifts.

## 3. Responsibilities

- **Shift Manager/Scheduler:** Creates and finalizes weekly shift rosters and ensures compliance with labor policies.
- **Department Heads:** Review and approve the finalized weekly schedule for their teams.
- **Employees:** Submit availability and shift preferences as required, and raise any shift-related concerns promptly.

## 4. Procedure

1. **4.1 Collect Employee Availability**
  - Request employees to submit their availability and shift preferences by the designated weekly deadline (e.g., every Wednesday for the following week).
2. **4.2 Assess Operational Requirements**
  - Review upcoming week's workload, peak hours, and critical coverage areas.
3. **4.3 Draft Shift Roster**
  - Create a preliminary shift schedule balancing coverage, workload, employee skill sets, rest periods, and preferences.
  - Ensure compliance with legal regulations and organizational policies.
4. **4.4 Review With Management**
  - Present draft to department heads for feedback and required adjustments.
5. **4.5 Finalize and Communicate Schedule**
  - Publish the final shift schedule at least 72 hours before the start of the week (e.g., by Friday noon for the following week).
  - Notify all employees and provide access to the schedule (e.g., via email, HR portal, or notice board).
6. **4.6 Monitor, Update, and Manage Changes**
  - Handle shift swaps, call-outs, or changes according to company policy and document all adjustments.
7. **4.7 Feedback and Continuous Improvement**
  - Encourage feedback on the process and make adjustments for future planning as necessary.

## 5. Documentation

All shift schedules and any subsequent changes shall be documented and retained for at least 12 months for recordkeeping and audit purposes.

## 6. Example Weekly Shift Roster Table

Employee	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Jane D.	08:00â€“16:00	08:00â€“16:00	OFF	08:00â€“16:00	08:00â€“16:00	OFF	OFF
Mark S.	16:00â€“00:00	16:00â€“00:00	16:00â€“00:00	OFF	16:00â€“00:00	OFF	16:00â€“00:00
Sara K.	OFF	00:00â€“08:00	00:00â€“08:00	00:00â€“08:00	OFF	00:00â€“08:00	OFF

## 7. Related Documents

- Employee Availability Form
- Shift Swap/Change Request Form
- Labor Law Guidelines
- HR Scheduling Policy

## 8. Revision History

Version	Date	Revised By	Description of Change
1.0	2024-06-17	HR Department	Initial version