



Checklist for Nurse Team-based Rostering



Checklist for implementing Team-based rostering

This checklist has been developed to support Allocate organisations in the process of setting up team-based rostering¹ as part of their flexible working offer to staff.

It has been developed from feedback from organisations who have implemented team-based rostering and from a pilot cohort of trusts in 2020/21.

Most teams undertake a pilot programme first to get staff feedback and develop the process for their team, learning as they go and building a model for their specific clinical area and then sharing the learning across the organisation.

Pre-programme	Checklist Item	Self-Assesment
	Do you have senior management and staff side support to implement team-based rostering?	
	How many staff in your team are currently working formal flexible working patterns?	
	Have you engaged with these staff to assure them that flexible working patterns will be honoured as part of their formal working agreement?	
	Have you worked through the Allocate Roster Review Checklist, which highlights best practice on roster configuration (link to the file on the portal here) and discussed your programme with your Customer Success Analyst to identify any further support you may require?	
	Do your staff use EOL/MeApp to access their off duty, make requests etc.? If your staff do not use this facility consistently, consider putting on training sessions to ensure this is the process being used going forward.	
	Does your organisation flexible working policy and procedure link and align to the organisation e-rostering, study leave, and annual leave polices to ensure staff are clear of expectations and processes?	
	Does your e-rostering policy highlight team-based rostering as an option for teams?	
	Have you undertaken a staff survey with your team to understand their current views around e-rostering and feedback on the pilot of team-based rostering? This process can help provide areas that you need to highlight in your engagement process.	
	Have you increased the time given for rosters to be written (your roster timetable) to ensure that sufficient time is given for staff in the early stages of the programme.	

Engagement	Checklist Item	Self-Assesment
	Have you met with your team to discuss implementing team-based rostering?	
	Do you want to set up a Teams meeting with an organisation who has implemented team- based rostering to get some feedback on their experience and what you can learn from them? Your Customer Success Analyst will be able to give you further details.	
	Have you agreed as a team how you will manage:	
	<ul style="list-style-type: none"> • Number of requests allowed – fixed number or the ability to request all shifts 	
	<ul style="list-style-type: none"> • Process for agreeing how to deal with over-requesting and how this will be resolved i.e., too many staff want the same shift 	
	<ul style="list-style-type: none"> • Requesting for nights and weekends to ensure equal spread across the team 	
	<ul style="list-style-type: none"> • Do you need to develop some guidelines for your team? 	
<ul style="list-style-type: none"> • Have you agreed the period for your pilot and how will you evaluate the results? 		
<ul style="list-style-type: none"> • Have you made staff aware that if too many staff request the same shift, those staff will be asked to work as a team to agree who will move to another shift, to ensure safer staffing across all shifts and that final approval is made by the Ward Manger/1st approver? 		

Monitoring progress and impact

Checklist Item	Self-Assesment
Have you agreed the key performance indicators (KPIs) you will review for the pilot and the period you will record for (both improvement and balancing measures to ensure that there are no unintended consequences)? KPIs include:	
• Approval time - national guidance is at least 6 weeks	
• Unused hours	
• Additional hours	
• Clinical unavailability including annual leave, sickness, study leave, maternity leave, working day and other leave	
• Temporary staffing – bank and agency	
• Unfilled duties	
• Number of changes to the roster after approval	
• Skill mix	
• Gender split – particularly important for mental health and learning disability teams	
• Time taken to complete the roster	
• Number of staff on flexible working pattern	
• Attrition rates	
• Staff feedback	
Have you agreed a start date with your team and the roster period you will be starting from?	
Do you have a longer-term plan for further roll out after the pilot if you are doing one first?	
Do you have a process of regular review meetings during the pilot with both team staff and senior management?	
Do you intend to repeat your staff survey at the end of the pilot to get feedback on the programme?	
Will you be sharing your pilot across your organisation to support other teams to implement team-based rostering?	
Have you included team-based rostering as an a flexible working model at your staff induction?	

Making it happen



ALLOCATE

an  RLDatix company

Allocate Software Ltd
Corporate and UK head office
1 Church Road Richmond
TW9 2QE UK

Tel. +44 (0)20 7355 5555
allocatesoftware.com