

***SITXHRM008***

***Roster staff.***



**Institute of Business and Management (Victoria)**

60 Belfast St Broadmeadows VIC 3047 | info@ibm.vic.edu.au | www. ibm.vic.edu.au

CRICOS: 03785D | TOID: 45516

**Structure of the workbook**

***Unit of Competency: SITXHRM008 Roster staff.***

***Part 1*** *- The workbook is structured to provide knowledge component in the first part including the introduction to the theoretical aspects of the unit and detailed description of the unit of competency knowledge development.*

***Part 2****-The development of your skills and knowledge which are sectioned to cover the unit elements and performance criteria to apply your skills and knowledge to gain competency for effective vocational outcomes.*

How to use the workbook

***First develop your knowledge***

1. *Read the workbook starting with the introduction to the subject of unit of competency and the details to develop your knowledge application.*
2. *Once reading is complete, attempt the review questions to ensure you develop your knowledge related to knowledge evidence required.*

***Then develop your skills and apply skills and knowledge for vocational outcome.***

1. *Actively read the workbook sections which are sectioned in line with unit elements and performance criteria to confirm the application of skills and knowledge related to achieve effective and efficient vocational outcome.*
2. *Attempt and complete all the learning activities in the workbook in relevant sections to develop your competency including use of foundation skills.*

***Copyright***

*© 2023 Dynamics Learning Pty Ltd. 2/23 Foster Street Surry Hills NSW 2010 Australia. (www.dynamicslearning.com.au).*

*This publisher holds the copyright of its reproduction and adaptation. All rights are reserved for publisher and authors including total or partial reproduction or adaptation and the Institute is provided with a license for use and sharing with learners for educational purposes.*

*Edition : 1*

*Compiled by : A K Don (MBA (UK), MPA (Aus.), Dip L & M, DipM, FAIM (MCIM, Chartered Marketer – Fmr))*

*Technical Contributor :*

***Disclaimer***

*The information contained in this manual is drawn from sources believed to be valid and reliable. The writer, the firm, its employees, agents, and contractors do not warrant the correctness of the sources used and accept no responsibility to any person or commercial body for any errors or omissions or for any loss or damage howsoever caused from the use of this manual. Every effort has been made to ensure that this publication is free from duplication, errors, or omissions. Information used from various sources including online materials, books and journals are tested for their validity, reliability, currency, and rephrased, adapted, quoted, and referenced.*

*However, if unsure, users should conduct their own enquiries and seek professional advice before relying on any fact, statement or matter contained in this book. Information in this unit is current at the time of publication. Some images, charts and graphics appearing in this resource have been developed by the writer and some are accessed and used from various freely available online sources.*

**Table of Contents**

[Unit Overview 3](#_Toc130908226)

[Introduction 4](#_Toc130908227)

[Roster staff 4](#_Toc130908228)

[Sources of information on awards and other industrial provisions 4](#_Toc130908229)

[Industrial agreements and other considerations which impact the preparation of staffing rosters: 6](#_Toc130908230)

[Key elements of applicable awards and enterprise agreements: 8](#_Toc130908231)

[Organisational human resource policies and procedures which impact the preparation of staffing rosters. 9](#_Toc130908232)

[Operational requirements of the business activity, department, or event subject to rostering 10](#_Toc130908233)

[Role of rosters and their importance in controlling staff costs 11](#_Toc130908234)

[Wage budget for the business activity, department, or event subject to rostering 12](#_Toc130908235)

[System capabilities and functions of rostering software programs 13](#_Toc130908236)

[Different formats for and inclusions of staff rosters 15](#_Toc130908237)

[Processes for modifying rosters. 17](#_Toc130908238)

[Methods used to communicate rosters, including both electronic and paper based. 18](#_Toc130908239)

[Skills development and application guidelines 19](#_Toc130908240)

[Section 1 21](#_Toc130908241)

[Develop staff rosters. 21](#_Toc130908242)

[Develop rosters according to relevant industrial agreements, other considerations, and wage budgets. 21](#_Toc130908243)

[Maximise operational and customer service efficiency while minimising wage costs. 22](#_Toc130908244)

[Combine duties where appropriate to ensure effective use of staff. 23](#_Toc130908245)

[Roster teams with complementary skills mix to meet operational requirements. 24](#_Toc130908246)

[Take account of social and cultural considerations and broader organisational policies that affect staff rosters. 25](#_Toc130908247)

[Consult with colleagues to obtain their input into rosters. 26](#_Toc130908248)

[Use roster systems and equipment to administer rosters. 26](#_Toc130908249)

[Section 2 29](#_Toc130908250)

[Present and communicate rosters. 29](#_Toc130908251)

[Present rosters in required formats to ensure clarity of information according to organisational standards. 29](#_Toc130908252)

[Communicate rosters to appropriate colleagues within designated timeframes. 31](#_Toc130908253)

[Section 3 34](#_Toc130908254)

[Maintain rostering records. 34](#_Toc130908255)

[Administer records of shift time completed by employees or contractors. 34](#_Toc130908256)

[Maintain staff rostering records according to organisational procedures. 35](#_Toc130908257)

[Section 4 37](#_Toc130908258)

[Evaluate rosters. 37](#_Toc130908259)

[Monitor effectiveness of rosters in consultation with colleagues. 37](#_Toc130908260)

[Identify ways in which rosters and roster development processes may be improved and take appropriate action. 38](#_Toc130908261)

[References 40](#_Toc130908262)

# Unit Overview

**Unit of Competency**

SITXHRM008 Roster staff

**Application of the unit**

This unit describes the performance outcomes, skills and knowledge required to develop, administer, and communicate staff rosters. It requires the ability to plan rosters according to industrial provisions, operational efficiency requirements, and within wage budgets.

This unit applies to individuals responsible for developing staff rosters for situations involving potentially large numbers of staff working across a range of different service periods or shifts. It does not apply to small office environments.

It applies to senior personnel who operate independently or with limited guidance from others, including dedicated specialist staff or operational supervisors and managers.

The unit applies to all tourism, travel, hospitality, and event sectors.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

**Unit Elements**

1. Develop staff rosters.
2. Present and communicate rosters.
3. Maintain rostering records.
4. Evaluate rosters.

**Learning Activities**

This learner workbook is designed with learning activities. At the end of each training session, learners must do learning activities to confirm the application of skills and knowledge that are developed to ensure learning objectives are achieved. Activities are indicated with following icons:

|  |  |  |  |
| --- | --- | --- | --- |
| **Icon** | **Activity/Description** | **Icon** | **Activity/Description** |
| Shape  Description automatically generated with low confidence | **Group Activity*** Group discussions
* Teamwork
 | Icon  Description automatically generated | **Written task.*** Written questioning.
* Written activities.
* Report writing
 |
| Icon  Description automatically generated | **Verbal Questioning**Trainer directs verbal questioning at learner/s | Icon  Description automatically generated | **Presentation**Learner makes presentations. |
| A picture containing text  Description automatically generated | **Individual verbal presentation**Learner present learning | Shape  Description automatically generated with low confidence | **Project work/Research** * Learner undertakes project work.
* Learner undertakes research work
 |
| Co-designing, role, role play, service design, tool, user icon - Download  on Iconfinder | **Role-play**Learner plays an assigned role | Case Study Svg Png Icon Free Download (#543478) - OnlineWebFonts.COM | **Case study**Lerner undertake a case study |

#

# Introduction

# Roster staff

**Roster**

The "roster" is a list or schedule of individuals, items, or events that are organised by a particular criteria or system. In a work context, a roster typically refers to a schedule of employee work shifts, indicating the days and times that each employee is expected to work. Rosters may also be used in other contexts, such as sports teams, transportation schedules, or volunteer work assignments. A roster can help to ensure that resources are allocated effectively, that work is completed efficiently, and that individuals are able to manage their time and responsibilities effectively. Rosters can be created manually or using digital tools and can be customized to meet the needs of a particular organisation or situation.

**Rostering staff**

Rostering staff involves creating and managing work schedules for employees. This process typically involves assigning shifts to employees based on factors such as availability, skills, and workload requirements. Effective staff rostering can help to ensure that a business or organisation is adequately staffed at all times, that employees are working efficiently, and that costs are managed effectively. When rostering staff, it is important to consider factors such as employee preferences, work-life balance, and legal requirements such as minimum break periods and maximum hours of work. Rostering software and tools can be used to simplify the process of creating and managing staff schedules, allowing managers to easily assign shifts, track employee availability, and make changes as needed. Effective staff rostering can help to promote productivity, employee satisfaction, and the overall success of a business or organisation.

## Photo happy restaurant team standing together in commercial kitchen

## Sources of information on awards and other industrial provisions

There are many sources of information on awards and other industrial provisions in the Australian context, ranging from government agencies and industry associations to legal services providers and other organisations. They include:

**Fair Work Commission**

The Fair Work Commission is Australia's national workplace relations tribunal. Their website provides information on modern awards, enterprise agreements, and other industrial provisions, as well as tools and resources for resolving workplace disputes.

**Fair Work Ombudsman**

The Fair Work Ombudsman is the national workplace relations regulator in Australia. Their website contains a wealth of information on awards, minimum wages, employment rights and obligations, and other workplace laws and regulations.

**Australian Government Department of Employment, Skills, Small and Family Business**

The Department of Employment, Skills, Small and Family Business provides information on workplace laws and regulations, including awards and other industrial provisions. Their website also contains resources for employers and employees, such as guides and fact sheets.

**Industry associations**

Many industry associations provide information on awards and other industrial provisions that are specific to their industry. Examples include the Australian Hotels Association, the Australian Nursing and Midwifery Federation, and the Australian Retailers Association.

**Legal services**

Legal services providers such as law firms and community legal centres can provide advice and information on awards and other industrial provisions, as well as assistance with workplace disputes and legal proceedings.

|  |
| --- |
| **Learning Activity 1**Sources of information on awards and other industrial provisions |
| **Activity type** | Individual verbal presentation |
| **Activity timing** | 3-5 minutes per learner |
| **Activity description**A picture containing text  Description automatically generated | For this activity, your trainer will randomly pick up few of trainees for a verbal presentation of the following. This will be an opportunity for others to learn and contribute by participating in the discussion.When the trainer directed to you, verbally present the following:* With reference to your workplace practice, describe sources of information on awards and other industrial provisions.
 |

## Industrial agreements and other considerations which impact the preparation of staffing rosters.

When preparing staffing rosters in Australia, employers must ensure that they are complying with a range of industrial agreements and other legal requirements, including modern awards, enterprise agreements, employment contracts, WHS requirements, and leave entitlements. Failure to comply with these requirements can result in legal and financial consequences for employers.

There are several industrial agreements and other considerations that impact the preparation of staffing rosters in Australia. Some of the key ones are:

* **Modern awards**

Modern awards are industry-specific awards that set out minimum wages and conditions of employment for employees in that industry. Employers must ensure that they are complying with the relevant modern award when preparing staff rosters.

* **Enterprise agreements**

Enterprise agreements are agreements between an employer and employees that set out conditions of employment, including hours of work and rosters. Employers must ensure that they are complying with any enterprise agreements that apply to their employees.

* **Employment contracts**

Employment contracts may include provisions relating to hours of work and rosters. Employers must ensure that they are complying with the terms of their employees' contracts when preparing staff rosters.

* **Part-time and casual employment**

Part-time and casual employees may have different entitlements and requirements regarding hours of work and rosters. Employers must ensure that they are complying with any relevant legislation or agreements when preparing rosters for part-time and casual employees.

* **Work Health and Safety (WHS) requirements**

Employers have a duty of care to provide a safe working environment for their employees. This includes ensuring that staffing rosters do not create fatigue or other WHS risks.

* **Leave entitlements.**

Employees are entitled to various types of leave, including annual leave, sick leave, and parental leave. Employers must ensure that they are providing employees with their entitlements to leave and that staffing rosters take into account the need for employees to take leave.

Employers must consider a range of industrial agreements and other legal requirements, including awards, enterprise agreements, leave entitlements, break periods, maximum shift lengths, pay rates, overall number of hours allocated, contractors, and permanent vs casual staff when preparing staffing rosters.

There are several industrial agreements and other considerations that impact the preparation of staffing rosters in Australia. Some of these considerations include:

* Single or multiple awards and enterprise agreements: Employers must ensure that they are complying with the correct industrial instrument when preparing staffing rosters. This could be a single modern award, or multiple awards and enterprise agreements that apply to different employees.

Award provisions for:

* Leave: Employers must ensure that they are providing employees with their entitlements to leave, including annual leave, personal/carer's leave, and parental leave. The relevant award will set out the specific provisions for leave entitlements.
* Mandated breaks between shifts: The relevant award or enterprise agreement may set out minimum break periods between shifts to prevent fatigue and ensure employee safety.
* Maximum allowed shift hours: The relevant award or enterprise agreement may set out maximum shift lengths to prevent fatigue and ensure employee safety.
* Standard, overtime, and penalty pay rates: Employers must ensure that they are paying employees correctly for their hours of work, including any overtime or penalty rates that may apply.
* Overall number of hours allocated to different staff members: Employers must ensure that they are allocating hours of work fairly and in compliance with the relevant award or enterprise agreement.

Use of contractors and consideration of fees:

* Employers must ensure that they are complying with any relevant laws and regulations when engaging contractors. They must also consider the fees associated with engaging contractors when preparing staffing rosters.

Use of permanent or casual staff:

* Employers must consider the needs of their business when determining whether to engage permanent or casual staff. Casual staff may be appropriate for businesses with fluctuating workloads, while permanent staff may provide greater stability and consistency.

|  |
| --- |
| **Learning Activity 2**Industrial agreements and other considerations which impact the preparation of staffing rosters. |
| **Activity type** | Group Discussion (observed by trainer) |
| **Activity timing** | 20 minutes |
| **Activity description**Shape  Description automatically generated with low confidence | Form small groups of 2-3 learners. Appoint a leader to manage the discussion.1. With reference to each team member’s workplace, discuss industrial agreements and other considerations which impact the preparation of staffing rosters.
2. Note down the discussion points.
3. Explain discussion points to the trainer when trainer asks your group.
 |

##

## Key elements of applicable awards and enterprise agreements

Employers must ensure that they are complying with the relevant award or enterprise agreement when preparing staffing rosters. This includes taking into account the provisions relating to leave entitlements, mandated breaks between shifts, maximum allowed shift hours, and pay rates. Failure to comply with these provisions can result in legal and financial consequences for employers.

Applicable awards and enterprise agreements contain specific provisions that govern the employment conditions of employees in a particular industry or workplace. Some of the key elements of these agreements include:

**Leave provisions.**

Awards and enterprise agreements contain provisions relating to the various types of leave that employees are entitled to, including annual leave, personal/carer's leave, and parental leave. These provisions set out the amount of leave that employees are entitled to, how and when it can be taken, and any other relevant requirements.

**Mandated breaks between shifts.**

Awards and enterprise agreements may include provisions for minimum break periods between shifts to prevent fatigue and ensure employee safety. These provisions may set out the duration of breaks and when they must be taken.

**Maximum allowed shift hours.**

Awards and enterprise agreements may set out maximum shift lengths to prevent fatigue and ensure employee safety. These provisions may set out the maximum number of hours that employees can work in a single shift, as well as any requirements for rest periods between shifts.

**Standard, overtime, and penalty pay rates.**

Awards and enterprise agreements contain provisions relating to pay rates for employees, including standard rates of pay, overtime rates, and penalty rates. These provisions set out the amount that employees are entitled to be paid for their hours of work, as well as any other relevant requirements.

|  |
| --- |
| **Learning Activity 3**Key elements of applicable awards and enterprise agreements |
| **Activity type** | Individual verbal presentation |
| **Activity timing** | 3-5 minutes per learner |
| **Activity description**A picture containing text  Description automatically generated | For this activity, your trainer will randomly pick up few of trainees for a verbal presentation of the following. This will be an opportunity for others to learn and contribute by participating in the discussion.When the trainer directed to you, verbally present the following:* Key elements of applicable awards and enterprise agreements
 |

## Organisational human resource policies and procedures which impact the preparation of staffing rosters.

Employers must ensure that they are complying with relevant organisational human resource policies and procedures when preparing staffing rosters. This includes ensuring that they are accommodating the needs of their employees and promoting a sociocultural-friendly and family-friendly workplace. Employers must also ensure that they are providing employees with their entitlements to leave, and that they are considering the social, cultural, and skills mix of their team when preparing rosters. Organisational human resource policies and procedures can have a significant impact on the preparation of staffing rosters. Some of the key policies and procedures to consider include:

**Sociocultural-friendly organisational initiatives**

Employers may have policies in place that promote a sociocultural-friendly workplace. This could include initiatives to promote diversity and inclusion, as well as policies that accommodate the needs of employees from different backgrounds or cultures.

**Family-friendly workplace initiatives**

Employers may have policies in place that promote a family-friendly workplace. This could include initiatives such as flexible working arrangements or support for employees with family responsibilities.

**Provisions for leave**

Employers must ensure that they are complying with the relevant provisions for leave entitlements. This may include provisions for carers leave, compassionate leave, sick leave, jury service, long service leave, maternity/paternity leave, rehabilitation of injured workers, study leave, recreation leave, and other types of leave.

**Social, cultural, and skills mix of the team to be rostered.**

Employers must consider the social, cultural, and skills mix of their team when preparing staffing rosters. This may include considerations such as the language proficiency of employees, their cultural background, and their level of experience or training.

|  |
| --- |
| **Learning Activity 4**Organisational human resource policies and procedures which impact the preparation of staffing rosters. |
| **Activity type** | Group Discussion (observed by trainer) |
| **Activity timing** | 20 minutes |
| **Activity description**Shape  Description automatically generated with low confidence | Form small groups of 2-3 learners. Appoint a leader to manage the discussion.1. With reference to each team member’s workplace, discuss Organisational human resource policies and procedures which impact the preparation of staffing rosters.
2. Note down the discussion points.
3. Explain discussion points to the trainer when trainer asks your group.
 |

## Operational requirements of the business activity, department, or event subject to rostering

Employers must consider the operational requirements of the business activity, department, or event when preparing staffing rosters. This includes ensuring that staffing levels are sufficient, the skill mix is appropriate, customer service and safety requirements are met, and cost considerations are balanced. Failure to consider these factors can lead to operational problems, dissatisfied customers, and increased costs.

The operational requirements of a business activity, department, or event are important factors to consider when preparing staff rosters. These requirements may vary depending on the nature of the business activity, department, or event, but may include:

Staffing levels: Employers must ensure that they have sufficient staff to meet the demands of the business activity, department, or event. This may require adjustments to staffing levels based on peak periods, seasonal variations, or other factors.

Skill mix: Employers must consider the skills and qualifications required for each position when preparing staffing rosters. This may involve ensuring that employees with specific skills or certifications are available for certain shifts or tasks.

Customer service requirements: Employers must consider the level of customer service required for the business activity, department, or event when preparing staffing rosters. This may involve ensuring that staff members with excellent communication skills or language proficiency are available for certain shifts.

Safety and security requirements: Employers must ensure that they have adequate staff to maintain safety and security for the business activity, department, or event. This may involve ensuring that staff members with relevant training or certifications are available for certain shifts or tasks.

Cost considerations: Employers must balance the operational requirements of the business activity, department, or event with cost considerations. This may involve finding ways to minimize staffing costs while still meeting the operational requirements of the business activity, department, or event.

|  |
| --- |
| **Learning Activity 5**Operational requirements of the business activity, department, or event subject to rostering |
| **Activity type** | Individual verbal presentation |
| **Activity timing** | 3-5 minutes per learner |
| **Activity description**A picture containing text  Description automatically generated | For this activity, your trainer will randomly pick up few of trainees for a verbal presentation of the following. This will be an opportunity for others to learn and contribute by participating in the discussion.When the trainer directed to you, verbally present the following:* With reference to your workplace practice, describe operational requirements of the business activity, department, or event subject to rostering.
 |

## Role of rosters and their importance in controlling staff costs

**Role of rosters**

The role of rosters is to ensure that an organisation has the right number of staff members with the right skills and qualifications to meet its operational needs. Rosters provide a schedule of work shifts for employees, ensuring that there are sufficient staff members available to cover different periods of the day, week, or month. Rosters also help to balance the workload among employees and ensure that staff members have an appropriate work-life balance. Effective rostering can improve productivity, reduce costs, and increase employee satisfaction, while inadequate or poorly planned rosters can lead to operational problems, lower productivity, and increased costs. As such, the role of rosters is critical to the success of any organisation.

**The role of rosters is critical in controlling staff costs.**

Effective rostering can help organisations to ensure that they have the right number of staff members with the right skills and qualifications to meet their operational needs, while minimizing unnecessary labour costs. Some of the ways that rosters can help to control staff costs include:

Accurate staffing levels: Rosters can help organisations to accurately determine the number of staff members required to meet their operational needs, avoiding overstaffing, or understaffing that can lead to unnecessary labour costs.

Efficient use of staff: Rosters can help organisations to make efficient use of their staff members by ensuring that they are deployed in the right place at the right time. This can reduce labour costs by avoiding the need for additional staff members.

Overtime management: Rosters can help organisations to manage overtime by ensuring that staff members are only working overtime when it is necessary to meet operational needs. This can reduce the need for unnecessary overtime and associated labour costs.

Balancing workload: Rosters can help organisations to balance the workload among employees, ensuring that staff members are not overworked or underworked. This can reduce the need for additional staff members or overtime, reducing labour costs.

|  |
| --- |
| **Learning Activity 6**Role of rosters and their importance in controlling staff costs |
| **Activity type** | Individual verbal presentation |
| **Activity timing** | 3-5 minutes per learner |
| **Activity description**A picture containing text  Description automatically generated | For this activity, your trainer will randomly pick up few of trainees for a verbal presentation of the following. This will be an opportunity for others to learn and contribute by participating in the discussion.When the trainer directed to you, verbally present the following:* Role of rosters and their importance in controlling staff costs
 |

## Wage budget for the business activity, department, or event subject to rostering

**Wage budget**

A wage budget is a financial plan that outlines the amount of money that an organisation expects to spend on employee wages and salaries over a specific period of time. The wage budget is typically prepared annually or quarterly and is based on the projected staffing levels, employee salaries and wages, and any anticipated changes in the organisation's operations or market conditions. The wage budget may also include other employee-related costs such as benefits, bonuses, and payroll taxes. The purpose of a wage budget is to provide a clear picture of the organisation's labour costs and to help ensure that it is operating within its financial means. By effectively managing their wage budget, organisations can control their labour costs, maintain profitability, and ensure that they are able to meet their operational needs.

A wage budget for a business activity, department, or event subject to rostering would be a financial plan that outlines the amount of money that an organisation expects to spend on employee wages and salaries for that specific activity, department, or event over a defined period of time. The wage budget for a rostered activity would be based on the projected staffing levels, hours of work, and expected pay rates for the employees who will be rostered for that activity. The wage budget may also include other employee-related costs such as benefits, bonuses, and payroll taxes. The purpose of the wage budget is to provide a clear picture of the organisation's labour costs for that activity, department, or event and to help ensure that it is operating within its financial means. By effectively managing their wage budget, organisations can control their labour costs, maintain profitability, and ensure that they are able to meet their operational needs for that specific activity, department, or event.

**The procedure to create a wage budget.**

The procedure to create a wage budget for a business activity, department, or event subject to rostering involves gathering information on staffing needs and employee-related costs, calculating the budget, reviewing and adjusting the budget, and communicating and monitoring the budget to ensure that it is aligned with the organisation's financial goals and objectives. The procedure to create a wage budget for a business activity, department, or event subject to rostering may involve the following steps:

* **Determine the scope.**

Determine the scope of the wage budget by identifying the business activity, department, or event that requires rostering. This will help to define the scope of the budget and ensure that it is focused on the specific area that requires attention.

* **Identify staffing needs.**

Identify the staffing needs for the business activity, department, or event. This will include determining the number of employees required, their hours of work, and expected pay rates.

* **Determine employee-related costs.**

Determine the employee-related costs associated with the business activity, department, or event. This will include calculating the cost of any benefits, bonuses, and payroll taxes that are applicable.

* **Calculate the wage budget.**

Use the information gathered in steps 2 and 3 to calculate the wage budget for the business activity, department, or event. This will involve estimating the total cost of wages and salaries for the rostered employees over the defined period of time.

* **Review and adjust.**

Review the wage budget to ensure that it is accurate and complete. Make any necessary adjustments to the budget to ensure that it aligns with the organisation's financial goals and objectives.

* **Communicate and monitor.**

Communicate the wage budget to relevant stakeholders and monitor the actual wage costs against the budget on an ongoing basis. This will help to identify any variances and ensure that the organisation is on track to meet its financial goals.

|  |
| --- |
| **Learning Activity 7**Wage budget for the business activity, department, or event subject to rostering |
| **Activity type** | Group Discussion (observed by trainer) |
| **Activity timing** | 20 minutes |
| **Activity description**Shape  Description automatically generated with low confidence | Form small groups of 2-3 learners. Appoint a leader to manage the discussion.With reference to each team member’s workplace, discuss the procedure used to wage budget for the business activity, department, or event subject to rostering.Note down the discussion points.Explain discussion points to the trainer when trainer asks your group. |

## System capabilities and functions of rostering software programs

**Software programs**

Software programs are sets of instructions that tell a computer or other electronic device what to do. These instructions are written in code and are designed to perform specific tasks, such as processing data, running applications, or controlling hardware devices. Software programs can be divided into two main categories: system software and application software. System software includes the operating system, device drivers, and other utilities that control the computer hardware and provide a platform for other software programs to run. Application software includes programs designed for specific tasks, such as word processing, graphics design, or video editing. Software programs are essential for modern computing and are used in a wide range of industries, including business, education, entertainment, and scientific research.

**System capabilities and functions of rostering software programs**

Rostering software programs can help organisations to manage employee schedules more efficiently, reduce labour costs, and ensure compliance with labour laws and regulations. Rostering software programs are designed to automate the process of creating staff schedules and provide a range of features and functions to help manage employee scheduling more efficiently. Some of the system capabilities and functions of rostering software programs include:

Shift scheduling: Rostering software programs can generate and manage employee schedules for different shifts, including regular, overtime, and on-call shifts.

Employee availability: Rostering software programs allow employees to set their availability and preferences for different shifts, which can be taken into account when creating schedules.

Skill matching: Rostering software programs can match employees' skills and qualifications with specific shifts or tasks, ensuring that the right staff members are assigned to the right job.

Time and attendance tracking: Rostering software programs can track employee time and attendance, making it easier to manage absences, tardiness, and other attendance issues.

Labour cost management: Rostering software programs can help to manage labour costs by providing tools for tracking and forecasting labour expenses, including overtime and other employee-related costs.

Compliance management: Rostering software programs can help to ensure compliance with labour laws and regulations by providing tools for managing employee leave entitlements, rest breaks, and other compliance issues.

Communication and collaboration: Rostering software programs can provide tools for communicating with employees and managing team collaboration, such as messaging, notifications, and task assignments.

|  |
| --- |
| **Learning Activity 8**System capabilities and functions of rostering software programs |
| **Activity type** | Group Discussion (observed by trainer) |
| **Activity timing** | 3-5 minutes per learner |
| **Activity description**Shape  Description automatically generated with low confidence | Form small groups of 2-3 learners. Appoint a leader to manage the discussion.1. With reference to each team member’s workplace, discuss system capabilities and functions of rostering software programs.
2. Note down the discussion points.
3. Explain discussion points to the trainer when trainer asks your group.
 |

## Different formats for and inclusions of staff rosters

The format and inclusions in staff rosters will depend on the needs of the organisation and the tools available for creating and managing the rosters.

There are various formats for staff rosters, and the inclusions in each format may differ depending on the needs of the organisation. Some of the different formats for staff rosters include:

Excel Spreadsheet: Excel is a commonly used program for creating and managing staff rosters. The spreadsheet can be customized to include the names of employees, the dates and times of their shifts, and any relevant notes or comments.

Online scheduling tools: There are several online scheduling tools available that allow organisations to create and manage staff rosters in the cloud. These tools offer features such as shift scheduling, employee availability, time and attendance tracking, and labour cost management.

Printed calendars: Some organisations still use printed calendars to create and manage staff rosters. These calendars can be customized to include the names of employees, their shifts, and any other relevant information.

The inclusions in staff rosters may vary depending on the needs of the organisation. Some common inclusions in staff rosters include:

* Employee names: Staff rosters typically include the names of employees who are scheduled to work.
* Dates and times: Staff rosters include the dates and times that employees are scheduled to work.
* Shifts: Staff rosters include information about the type of shift that employees are scheduled to work, such as morning, afternoon, or night shifts.
* Availability: Staff rosters may include information about employee availability, including any days or times that they are unavailable to work.
* Skills and qualifications: Staff rosters may include information about employee skills and qualifications to ensure that they are assigned to tasks that match their abilities.
* Breaks and rest periods: Staff rosters may include information about mandated breaks and rest periods for employees.
* Overtime and penalty rates: Staff rosters may include information about overtime and penalty rates for employees who work outside of their regular hours.

Example staff roster format

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Employee Name** | **Mon** | **Tue** | **Wed** | **Thu** | **Fri** | **Sat** | **Sun** |
| John Smith | 8:00 am - 4:00 pm | 8:00 am - 4:00 pm | 8:00 am - 4:00 pm | OFF | OFF | OFF | OFF |
| Jane Doe | 12:00 pm - 8:00 pm | 12:00 pm - 8:00 pm | OFF | 12:00 pm - 8:00 pm | 12:00 pm - 8:00 pm | OFF | OFF |
| Bob Johnson | OFF | 6:00 am - 2:00 pm | 6:00 am - 2:00 pm | 6:00 am - 2:00 pm | OFF | OFF | OFF |
| Sarah Lee | OFF | OFF | 4:00 pm - 12:00 am | 4:00 pm - 12:00 am | 4:00 pm - 12:00 am | OFF | OFF |
| Mike Lee | OFF | OFF | OFF | OFF | 8:00 pm - 4:00 am | 8:00 pm - 4:00 am | 8:00 pm - 4:00 am |

In this example, the roster includes the names of the employees, the days of the week (Monday through Sunday), and the hours that each employee is scheduled to work for each day. The format uses a table with rows for each employee and columns for each day of the week.

Each cell in the table contains the start and end times for the employee's shift for that day. If an employee has a day off, the cell is left blank. The format also allows for different types of shifts, such as morning, afternoon, or night shifts.

This is just one example of a staff roster format, and the actual format used by an organisation may vary depending on its specific needs and requirements.

|  |
| --- |
| **Learning Activity 9**Different formats for and inclusions of staff rosters |
| **Activity type** | Written Task |
| **Activity timing** | 20 minutes |
| **Activity description**Icon  Description automatically generated | Undertake the following activity:With reference to each team member’s workplace, identify at least three personnel. Develop a hypothetical roster using applicable format according to your workplace.Provide a verbal report of your work outcomes when the trainer randomly asks you.Ensure you communicate concisely and cover comprehensively using oral communication skills. |

## Processes for modifying rosters.

The process for modifying rosters involves identifying the need for modification, determining the impact of the modification, communicating the proposed modification, obtaining approval, implementing the modification, and monitoring and adjusting, as necessary. By following a structured process, organisations can ensure that roster modifications are managed effectively and efficiently, with minimal disruption to operations and employee schedules.

The process include:

Identify the need for modification: The first step in modifying a roster is to identify the need for the modification. This could be due to changes in the business activity or department, employee availability, or other factors.

Determine the impact of the modification: Once the need for modification has been identified, it is important to determine the impact of the modification on the roster. This could include changes to staffing levels, shift schedules, and labour costs.

Communicate the proposed modification: The proposed modification should be communicated to all relevant stakeholders, including employees and managers, to ensure that everyone is aware of the changes and any impact on their schedules.

Obtain approval: If the modification requires approval, it should be submitted to the appropriate manager or authority for review and approval.

Implement the modification: Once the modification has been approved, it can be implemented. This may involve updating the roster, informing affected employees of their new schedules, and making any necessary adjustments to labour costs.

Monitor and adjust as necessary: After the modification has been implemented, it is important to monitor its effectiveness and make any necessary adjustments. This could include further modifications to the roster or adjustments to labour costs.

|  |
| --- |
| **Learning Activity 10**Processes for modifying rosters. |
| **Activity type** | Individual verbal presentation |
| **Activity timing** | 3-5 minutes per learner |
| **Activity description**A picture containing text  Description automatically generated | For this activity, your trainer will randomly pick up few of trainees for a verbal presentation of the following. This will be an opportunity for others to learn and contribute by participating in the discussion.When the trainer directed to you, verbally present the following:With reference to your workplace practice, describe processes for modifying rosters. |

## Methods used to communicate rosters, including both electronic and paper based.

The method used to communicate rosters will depend on the needs and preferences of the organisation and its employees. Electronic options are becoming increasingly popular due to their convenience and accessibility, but paper-based options can still be effective for employees who do not have regular access to technology. There are several methods used to communicate rosters, including both electronic and paper-based options. Some of the most common methods include:

* **Email.**

Rosters can be sent via email to all employees, providing them with easy access to their schedules. This can be particularly useful for employees who work remotely or outside of regular business hours.

* **Online scheduling tools.**

Online scheduling tools can provide employees with access to their schedules from any device with internet access. These tools can also provide alerts and notifications to employees when their schedules have been updated.

* **Printed rosters.**

Printed rosters can be posted in common areas or distributed to employees as paper copies. This can be particularly useful for employees who do not have regular access to email or online scheduling tools.

* **Mobile applications.**

Mobile applications can provide employees with access to their schedules from their smartphones or tablets. This can be particularly useful for employees who are constantly on-the-go.

* **In-person communication.**

Rosters can be communicated to employees in-person during team meetings or one-on-one conversations. This can be particularly useful for addressing any questions or concerns that employees may have about their schedules.

|  |
| --- |
| **Learning Activity 11**Methods used to communicate rosters, including both electronic and paper based. |
| **Activity type** | Individual verbal presentation |
| **Activity timing** | 3-5 minutes per learner |
| **Activity description**A picture containing text  Description automatically generated | For this activity, your trainer will randomly pick up few of trainees for a verbal presentation of the following. This will be an opportunity for others to learn and contribute by participating in the discussion.When the trainer directed to you, verbally present the following:* With reference to your workplace practice, describe methods used to communicate rosters, including both electronic and paper based.
 |

# Skills development and application guidelines

**Learning outcome description**

The following sections of this workbook describe the required application of skills and knowledge required to develop, administer, and communicate staff rosters. It requires the ability to plan rosters according to industrial provisions, operational efficiency requirements, and within wage budgets.

This unit applies to individuals responsible for developing staff rosters for situations involving potentially large numbers of staff working across a range of different service periods or shifts. It does not apply to small office environments.

It applies to senior personnel who operate independently or with limited guidance from others, including dedicated specialist staff or operational supervisors and managers.

The unit applies to all tourism, travel, hospitality, and event sectors.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

**Required performance outcome.**

Upon completion of the following sections, you must be able to complete tasks described in the sections of this unit in the context of the job role, and:

* prepare staff rosters that meet diverse operational requirements across three different roster periods.
* ensure the following when preparing the above staff rosters:
* sufficient staff to ensure the delivery of required services within wage budget constraints.
* appropriate skills mix of the team.
* modifications are incorporated where required.
* compliance with industrial provisions and organisational policies and procedures
* completion of rosters within commercial and staff time constraints.

**Skills application**

The following sections includes the application of language, literacy, numeracy, and employment skills that are essential to performance.

Foundation Skills

|  |
| --- |
| Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement. |
| SKILLS | DESCRIPTION |
| Reading skills to: | interpret documents outlining opening and closing times, operational hours, and expected customer traffic. |
| Writing skills to: | write potentially complex roster documentation. |
| Oral communication skills to: | ask colleagues questions to confirm their requirements.listen to and interpret messages. |
| Numeracy skills to: | complete planning activities involving dates, times, and staff ratios. |
| Problem-solving skills to: | re-work rosters in cases of staff illness. |
| Teamwork skills to: | consider staff requests and personal commitments when planning rosters. |
| Technology skills to: | use system capabilities and functions of rostering software programs. |

# Section 1

# Develop staff rosters.

## Develop rosters according to relevant industrial agreements, other considerations, and wage budgets.

**Industrial agreements**

Industrial agreements are legal documents that define the terms and conditions of employment between an employer and its employees. These agreements are negotiated between the employer and employee representatives, such as trade unions or employee associations, and are designed to protect the interests of both parties. Industrial agreements typically cover a range of employment-related matters, including wages, hours of work, leave entitlements, workplace health and safety, and dispute resolution procedures. Industrial agreements can take the form of enterprise agreements, collective agreements, or individual contracts of employment. They are an important aspect of the employment relationship, as they provide a framework for the rights and responsibilities of both employers and employees and help to ensure that the terms and conditions of employment are fair and consistent across the organisation.

**Develop rosters.**

develop rosters according to relevant industrial agreements, other considerations, and wage budgets. It is a structured approach that takes into account the needs of the organisation and its employees. By following this approach, organisations can ensure that their rosters are consistent with their legal and financial obligations, while also meeting the needs of their employees and the operational requirements of the business. Developing rosters according to relevant industrial agreements, other considerations, and wage budgets involves a structured approach that considers the needs of the organisation and its employees. The followings are some key steps to follow:

* **Understand the relevant industrial agreements:** Before developing rosters, it is important to understand the relevant industrial agreements that apply to the organisation. This may involve consulting with trade unions or employee associations to ensure that the rosters are consistent with the terms and conditions of employment.
* **Consider other relevant factors:** In addition to industrial agreements, there may be other relevant factors to consider when developing rosters. For example, the operational requirements of the business, department or event, employee availability, and the social and cultural mix of the team may all need to be considered.
* **Develop the roster**: Using the information gathered in the previous steps, develop the roster in a way that meets the needs of the organisation and its employees. This may involve using rostering software or other tools to generate and manage the roster.
* **Review the roster against wage budgets**: Once the roster has been developed, it is important to review it against the wage budget for the organisation. This will help to ensure that the roster is consistent with the organisation's financial constraints and that labour costs are being managed effectively.
* **Obtain approval**: Once the roster has been reviewed and finalized, it should be submitted to the appropriate manager or authority for review and approval.
* **Communicate the roster**: Once the roster has been approved, it should be communicated to all relevant stakeholders, including employees and managers. This may involve using electronic or paper-based methods, as discussed earlier.

## Maximise operational and customer service efficiency while minimising wage costs.

Maximize operational and customer service efficiency while minimizing wage costs by finding the right balance between meeting customer needs and managing labour costs. By using data to inform rostering decisions, implementing flexible scheduling options, cross-training employees, using technology to streamline processes, encouraging employee productivity, and continuously monitoring and adjusting rostering decisions, businesses can achieve this balance and maximize their operational and financial performance.

Maximizing operational and customer service efficiency while minimizing wage costs involves finding the right balance between meeting customer needs and managing labour costs. The followings are some key strategies to consider:

* **Use data to inform rostering decisions.**

Analysing data such as historical sales, customer traffic patterns, and employee productivity can help to inform rostering decisions. By understanding when and where customers are most likely to be present, businesses can schedule employees to be available when they are needed most.

* **Implement flexible scheduling options.**

Offering flexible scheduling options such as part-time, casual, or split shifts can help businesses to manage labour costs while still meeting customer needs. This can be particularly useful during peak periods when demand is high.

* **Cross-train employees.**

Cross-training employees in multiple roles can help to ensure that there are always enough staff available to meet customer needs. This can also help to reduce labour costs by allowing employees to work in multiple areas of the business as needed.

* **Use technology to streamline processes.**

Utilizing technology such as self-service kiosks, mobile ordering, and online booking systems can help to streamline processes and reduce labour costs by reducing the need for employees to perform certain tasks.

* **Encourage employee productivity.**

Encouraging employee productivity through incentives, recognition, and training can help to ensure that employees are working efficiently and effectively. This can help to reduce the need for additional staff while still meeting customer needs.

* **Monitor and adjust as needed.**

Continuously monitoring and adjusting rostering decisions based on customer needs and labour costs can help businesses to find the right balance between operational and customer service efficiency and wage costs.

## Combine duties where appropriate to ensure effective use of staff.

**Duties**

Duties refer to the specific tasks and responsibilities that are assigned to employees within an organisation. These duties can vary widely depending on the type of organisation and the role of the employee. Duties may include tasks such as providing customer service, managing inventory, processing transactions, preparing reports, conducting research, or performing maintenance tasks. Duties are typically outlined in job descriptions, which provide employees with a clear understanding of their responsibilities and expectations. Duties may also be assigned by managers or supervisors based on the needs of the organisation or specific projects. Clear communication of duties is essential to ensure that employees understand their responsibilities and are able to perform their tasks effectively. By assigning duties in a clear and structured way, organisations can ensure that their employees are working efficiently and effectively, which can help to improve organisational performance and achieve business objectives.

**How to Combine duties where appropriate to ensure effective use of staff.**

Combining duties where appropriate can help to ensure the effective use of staff and optimize productivity within an organisation. By identifying areas where duties can be combined, cross-training employees, communicating clearly, monitoring performance, and adjusting as needed, organisations can achieve their performance objectives and maximize their operational efficiency. Combining duties where appropriate can be an effective way to ensure the effective use of staff and optimize productivity within an organisation. The followings are some strategies to consider:

* **Identify areas where duties can be combined.**

Start by identifying areas where duties can be combined without compromising quality or efficiency. This may involve Analysing processes and workflows to identify opportunities for streamlining and simplifying tasks.

* **Cross-train employees.**

Cross-training employees in multiple roles can help to ensure that there are enough staff available to perform combined duties effectively. This can also help to reduce the need for additional staff, which can help to optimize productivity and minimize labour costs.

* **Communicate clearly.**

Clear communication is essential when combining duties. Employees need to understand their new responsibilities and the expectations associated with those responsibilities. Managers should communicate clearly and regularly with staff to ensure that everyone is aware of any changes and understands their role.

* **Monitor performance**.

It is important to monitor performance when combining duties to ensure that the new approach is effective. Managers should regularly review performance metrics such as productivity, quality, and customer satisfaction to ensure that the new approach is achieving the desired results.

* **Adjust as needed.**

If the new approach is not achieving the desired results, adjustments may be necessary. Managers should be willing to make changes to the combined duties as needed to ensure that they are effective and efficient.

## Roster teams with complementary skills mix to meet operational requirements.

**Complementary skills**

Complementary skills refer to skills that work well together and enhance each other's effectiveness. These skills can be possessed by individuals or teams and can be used to achieve common goals. For example, a team of developers may have complementary skills such as programming, testing, and project management. These skills work together to produce a high-quality software product. Complementary skills can also refer to soft skills such as communication, collaboration, and problem-solving. These skills are essential for effective teamwork and can help individuals to work together more effectively to achieve common goals. Complementary skills are important because they allow individuals and teams to work together more effectively and achieve better results. When complementary skills are combined, they can help to overcome individual weaknesses and limitations, leading to better problem-solving, decision-making, and innovation.

Rostering teams with complementary skill mixes to meet operational requirements involves a structured approach that considers the needs of the organisation and its employees. By understanding the operational requirements, identifying complementary skills, assigning roles based on complementary skills, encouraging collaboration, monitoring performance, and adjusting as needed, organisations can optimize their team performance and achieve better outcomes. Rostering teams with complementary skill mixes to meet operational requirements involves a structured approach that takes into account the needs of the organisation and its employees. The followings are some key steps to follow:

* **Understand the operational requirements.**

Before rostering teams, it is important to understand the operational requirements of the business, department, or event. This may involve consulting with managers or supervisors to ensure that the teams are rostered in a way that meets the operational needs of the organisation.

* **Identify complementary skills.**

Identify the skills required for the specific tasks and responsibilities of the team. Consider the skills that are needed to achieve the desired outcomes and identify the skills that complement each other.

* **Assign roles based on complementary skills.**

Assign roles to team members based on their complementary skills. This may involve cross-training team members in multiple roles to ensure that the team has a diverse range of skills to draw upon.

* **Encourage collaboration.**

Encourage team members to collaborate and share their skills and knowledge with each other. This can help to enhance the effectiveness of the team and promote a culture of learning and development.

* **Monitor performance.**

It is important to monitor team performance to ensure that the team is working effectively and achieving the desired outcomes. Use metrics such as productivity, quality, and customer satisfaction to measure the team's performance.

* **Adjust as needed.**

If the team is not achieving the desired results, adjustments may be necessary. Managers should be willing to make changes to the team's roster or roles as needed to ensure that the team is effective and efficient.

## Take account of social and cultural considerations and broader organisational policies that affect staff rosters.

Taking account of social and cultural considerations and broader organisational policies that affect staff rosters involves a sensitive and inclusive approach to rostering practices. By understanding the unique needs and values of individual employees and the organisation as a whole, and implementing appropriate policies and practices, organisations can foster a positive workplace culture that supports the needs of all employees and promotes organisational success. Taking account of social and cultural considerations and broader organisational policies that affect staff rosters involves understanding the unique needs and values of individual employees and the organisation as a whole. The followings are some strategies to consider:

* **Understand social and cultural considerations.**

Consider the social and cultural backgrounds of individual employees when rostering teams. This may involve accommodating cultural or religious practices, such as prayer times or dietary requirements, or considering social needs, such as childcare or transportation requirements.

* **Implement family-friendly workplace policies.**

Consider implementing family-friendly policies, such as flexible working arrangements or parental leave, to support employees with caring responsibilities.

* **Adhere to relevant organisational policies.**

Ensure that rosters comply with relevant organisational policies, such as those relating to leave entitlements, workplace health and safety, and equal opportunity.

* **Foster a positive workplace culture.**

Promote a positive workplace culture that values diversity and inclusivity. Encourage employees to share their perspectives and provide feedback on rostering practices to ensure that they feel heard and supported.

* **Monitor and adjust as needed.**

Continuously monitor and adjust rostering practices to ensure that they are consistent with social and cultural considerations and organisational policies. Regularly seek feedback from employees and managers to identify areas for improvement.

## Consult with colleagues to obtain their input into rosters.

Consulting with colleagues to obtain their input into rosters can help to promote collaboration and teamwork while ensuring that rostering decisions reflect the needs and perspectives of all employees. By scheduling regular team meetings, seeking feedback from colleagues, taking into account colleagues' preferences, fostering a culture of open communication, and adjusting rosters as needed, organisations can optimize their rostering practices and improve employee engagement and satisfaction. Strategies to consider include:

* **Schedule regular team meetings.**

Schedule regular team meetings to discuss rostering practices and obtain input from colleagues. Use these meetings as an opportunity to share information and discuss any challenges or concerns related to rostering practices.

* **Seek feedback from colleagues.**

Encourage colleagues to provide feedback on rostering practices, such as the timing and length of shifts, workload distribution, and overall rostering practices. This feedback can be collected through surveys, focus groups, or individual feedback sessions.

* **Consider colleagues' preferences.**

Consider colleagues' preferences when rostering teams, such as their preferred work hours, days off, or workload. This can help to ensure that rostering practices are inclusive and take into account individual needs and preferences.

* **Foster a culture of open communication.**

Promote a culture of open communication and encourage colleagues to share their perspectives and feedback on rostering practices. This can help to ensure that all employees feel heard and valued and that rostering decisions reflect the needs and perspectives of all employees.

* **Adjust rosters as needed.**

Use the feedback and input from colleagues to adjust rosters as needed. This may involve making changes to the timing or length of shifts, adjusting workload distribution, or revising overall rostering practices.

## Use roster systems and equipment to administer rosters.

Using roster systems and equipment to administer rosters involves a structured approach that considers the needs and requirements of the organisation. By selecting an appropriate roster system, training staff on system use, inputting data into the system, generating rosters, monitoring performance, and adjusting as needed, organisations can optimize their rostering practices and improve operational efficiency. Using roster systems and equipment to administer rosters involves a structured approach that takes into account the specific needs and requirements of the organisation. The followings are some strategies to consider:

* **Select a roster system.**
* Choose a roster system that is appropriate for the needs and requirements of the organisation. Consider factors such as the number of employees, the complexity of rostering practices, and the features and functionality of the system.
* **Train staff on roster system use.**

Train staff on how to use the roster system effectively. This may involve providing user manuals or training sessions to ensure that staff understand how to use the system and the features and functions available.

* **Input data into roster system.**

Input the relevant data into the roster system, such as employee names, roles, and availability. Ensure that the data is accurate and up to date to optimize the effectiveness of the system.

* **Generate rosters.**

Use the roster system to generate rosters based on the operational requirements and staff availability. Consider factors such as skill mix, workload distribution, and staff preferences when generating rosters.

* **Monitor performance.**

Monitor the performance of the roster system to ensure that it is effective and efficient. Use metrics such as productivity, quality, and customer satisfaction to measure the performance of the system and make adjustments as needed.

* **Adjust as needed.**

If the roster system is not effective or efficient, adjustments may be necessary. Managers should be willing to make changes to the system or seek additional training or support to ensure that the system is working optimally.

**Self-Directed Learning Task 1**

**Develop Staff Rosters**

**Objective:** Enhance your skills in developing effective staff rosters that align with industrial agreements, optimize operational efficiency, and consider various factors such as wage budgets, duty combinations, skills mix, social/cultural considerations, and organisational policies.

**Duration:** Allocate 4-10 hours for self-directed learning.

**Task Overview:** As a manager responsible for rostering staff, it's crucial to create schedules that balance operational needs and Labor costs while considering multiple factors. This self-directed learning task focuses on improving your roster development skills.

**Task Activities:**

1. **Understanding Industrial Agreements:** Research and familiarize yourself with the relevant industrial agreements applicable to your organisation or industry. Note down key provisions that impact staff rostering.
2. **Optimizing Efficiency:** Investigate techniques and strategies for maximizing operational and customer service efficiency while minimizing wage costs. Explore methods such as demand forecasting and efficient duty allocation.
3. **Duty Combinations:** Analyse the benefits of combining duties when appropriate to ensure staff's effective utilization. Develop scenarios where duty combinations can improve operational effectiveness.
4. **Skills Mix:** Research the concept of a skills mixes and its significance in staff rostering. Create a skills matrix template that can be used to evaluate and roster teams with complementary skill sets.
5. **Social and Cultural Considerations:** Investigate how social and cultural factors can impact staff rosters. Develop guidelines or a checklist to ensure that these considerations are incorporated into your rostering process.
6. **Consultation and Input:** Explore effective methods for consulting with colleagues to obtain their input into the rostering process. Develop a communication plan for seeking and incorporating their feedback.
7. **Roster Administration Tools:** Familiarize yourself with roster systems and equipment used in the administration of staff rosters. Learn how to use relevant software or tools effectively.

**Reflection:** Reflect on the insights gained during this self-directed learning task. Consider how these strategies can be applied to create more efficient and effective staff rosters in your role.

**Evidence:** Provide evidence of your learning goals, understanding of relevant industrial agreements, efficiency optimization strategies, duty combination scenarios, skills matrix template, social and cultural considerations checklist, communication plan for colleague input, and proficiency in roster administration tools. This evidence demonstrates your commitment to improving your rostering skills.

# Section 2

# Present and communicate rosters.

## Present rosters in required formats to ensure clarity of information according to organisational standards.

Presenting rosters in required formats to ensure clarity of information according to organisational standards involves a structured approach that considers the specific needs and requirements of the organisation. By using clear and concise language, highlighting important information, ensuring consistency, using appropriate technology, providing instructions, and consulting with managers or supervisors as needed, organisations can optimize their rostering practices and improve the clarity and effectiveness of their rostering communication.

Present rosters in required formats to ensure clarity of information according to organisational standards a structured approach that takes into account the specific needs and requirements of the organisation. The followings are some strategies to consider:

* **Understand the required format.**

Understand the required format for presenting rosters according to organisational standards. This may involve consulting with managers or supervisors to ensure that the rosters are presented in a way that meets the needs of the organisation.

* **Use clear and concise language**.

Use clear and concise language when presenting rosters to ensure that the information is easy to understand. Avoid using technical jargon or acronyms that may be unfamiliar to staff.

* **Highlight important information.**

Highlight important information, such as shifts or task assignments, using bold or colour to ensure that it stands out. This can help to ensure that staff can quickly and easily find the information they need.

* **Ensure consistency.**

Ensure that the format and style of the roster is consistent across all departments or teams. This can help to ensure that staff can easily navigate and understand the information presented.

* **Use appropriate technology**.

Use appropriate technology, such as electronic or digital platforms, to present rosters in a way that is easy to access and navigate. Consider the needs and preferences of staff when selecting the technology to use.

* **Provide instructions.**

Provide clear instructions on how to read and interpret the roster. This can help to ensure that staff understand how to use the roster effectively and can find the information they need quickly and easily.

**Roster formats**

Weekly Roster Format: This format is ideal for organisations with a consistent weekly schedule. It includes columns for the days of the week and rows for each employee's shift times. The format can be adjusted to accommodate different shift lengths, break periods, and other relevant information.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Employee Name | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
| John Smith | 8am-4pm | 8am-4pm | 8am-4pm | 8am-4pm | Off | Off | Off |
| Jane Doe | 4pm-12am | 4pm-12am | 4pm-12am | 4pm-12am | Off | Off | Off |
| Bob Johnson | Off | Off | Off | Off | 8am-4pm | 8am-4pm | 8am-4pm |

Monthly Roster Format: This format is ideal for organisations with more complex or irregular schedules, such as those that require employees to work rotating shifts or alternate between different roles or responsibilities. It includes columns for the days of the month and rows for each employee's shift times, as well as any other relevant information.

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Employee Name | Day 1 | Day 2 | Day 3 | Day 4 | Day 5 | Day 6 | Day 7 | Day 8 | Day 9 | Day 10 |  |
| John Smith | Off | 8am-4pm | 4pm-12am | Off | Off | 8am-4pm | 8am-4pm | Off | Off | 4pm-12am |  |
| Jane Doe | 8am-4pm | 4pm-12am | Off | Off | 4pm-12am | 8am-4pm | Off | Off | 4pm-12am | Off |  |
| Bob Johnson | 4pm-12am | Off | Off | 8am-4pm | Off | Off | 8am-4pm | 4pm-12am | Off | Off |  |

These are just examples, and the actual format used will depend on the specific needs and requirements of the organisation.

## Communicate rosters to appropriate colleagues within designated timeframes.

**Designated timeframes**

Designated timeframes refer to specific periods of time that have been assigned or allocated for a particular task or activity. These timeframes may be set by an individual, a team, or an organisation, and are often established to ensure that tasks are completed within a certain timeframe or deadline. Designated timeframes may also be used to allocate resources, such as staff or equipment, to ensure that they are used efficiently and effectively. The length and specificity of designated timeframes may vary depending on the task or activity being performed and may range from a few minutes or hours to several days or weeks.

Designated timeframes are important because they help to ensure that tasks and activities are completed in a timely and efficient manner and can help to promote productivity and achieve organisational goals.

**Appropriate colleagues**

Appropriate colleagues refer to individuals who are suitable and relevant to a particular task or activity. They may be individuals who have the necessary skills, knowledge, and experience to perform a particular task effectively, or who have a particular role or responsibility within the organisation. Appropriate colleagues may also refer to individuals who are able to provide valuable feedback or input into a particular decision or project. It is important to identify and engage appropriate colleagues in order to ensure that tasks and activities are completed effectively and efficiently, and that decisions are well-informed and well-supported. The identification of appropriate colleagues may involve consulting with managers or supervisors, conducting research, or seeking feedback from individuals within the organisation. Ultimately, the goal is to ensure that the appropriate colleagues are engaged and involved in a way that is meaningful and relevant to the task or activity at hand.

**Communicate rosters to appropriate colleagues.**

Communicating rosters to appropriate colleagues within designated timeframes involves a structured approach that takes into account the specific needs and requirements of the organisation. By determining the appropriate communication channels, establishing a clear timeline, providing clear instructions, being consistent, seeking feedback, and using appropriate technology, organisations can optimize their rostering practices and improve the effectiveness and efficiency of roster communication. Communicating rosters to appropriate colleagues within designated timeframes involves a structured approach that takes into account the specific needs and requirements of the organisation. The followings are some strategies to consider:

* **Determine the appropriate communication channels**.

Determine the appropriate communication channels for sharing rosters with colleagues. This may involve using digital platforms, such as email or online collaboration tools, or paper-based communication, such as printed copies of the roster.

* **Establish a clear timeline**.

Establish a clear timeline for communicating the roster to colleagues. This may involve establishing a regular schedule for sharing rosters or setting specific deadlines for sharing information.

* **Provide clear instructions.**

Provide clear instructions on how to access or interpret the roster. This can help to ensure that colleagues understand how to access the information they need and can quickly and easily find the information they need.

* **Be consistent.**

Be consistent in the way that rosters are communicated to colleagues. This can help to ensure that colleagues know what to expect and can plan accordingly.

* **Seek feedback.**

Seek feedback from colleagues on the effectiveness of the communication process. This can help to identify any areas for improvement and ensure that colleagues have a say in how the roster is communicated.

* **Use appropriate technology**.

Use appropriate technology, such as electronic or digital platforms, to share rosters in a way that is easy to access and navigate. Consider the needs and preferences of colleagues when selecting the technology to use.

**Self-Directed Learning Task 2**

**Presenting and Communicating Rosters**

**Objective:** Enhance your skills in presenting staff rosters clearly and effectively in the required formats. Learn to communicate rosters to colleagues within designated timeframes while adhering to organisational standards.

**Duration:** Allocate 4-10 hours for self-directed learning.

**Task Overview:** In this self-directed learning task, you'll focus on improving your ability to present staff rosters in a clear and organised manner. Additionally, you'll practice effective communication of rosters to colleagues, ensuring they receive the necessary information promptly.

**Task Activities:**

1. **Understanding Required Formats:** Research and identify the formats and templates commonly used for presenting staff rosters in your organisation or industry. Understand the importance of clarity and consistency in roster presentation.
2. **Sample Roster Creation:** Create a sample staff roster using the identified format. Consider including various shifts, roles, and responsibilities to simulate a real-world roster.
3. **Organisational Standards:** Familiarize yourself with the organisational standards and guidelines for roster presentation. Pay attention to details such as font size, layout, and any specific information that must be included.
4. **Communication Channels:** Explore different communication channels and methods for sharing rosters with colleagues. Evaluate the pros and cons of each method, such as email, digital platforms, or printed copies.
5. **Timely Distribution:** Develop a strategy for ensuring that rosters are communicated to appropriate colleagues within designated timeframes. Consider setting up reminders or automated notifications to streamline this process.
6. **Feedback Mechanism:** Investigate how colleagues can provide feedback or seek clarification regarding their assigned shifts or responsibilities. Develop a system for addressing their inquiries efficiently.

**Reflection:** Reflect on the importance of clear roster presentation and timely communication. Consider how your improved skills in this area can contribute to smoother operations and increased employee satisfaction.

**Evidence:** Provide evidence of your learning, including the sample roster created, an understanding of required formats, adherence to organisational standards, knowledge of communication channels, a strategy for timely distribution, and a system for addressing colleague inquiries. This evidence demonstrates your commitment to improving roster presentation and communication skills.

# Section 3

# Maintain rostering records.

## Administer records of shift time completed by employees or contractors.

**Shift time.**

Shift time is the period of time during which an employee is scheduled to work. This may include the start and end times of a shift, as well as any breaks or meal periods that are scheduled during the shift. The length of a shift time may vary depending on the organisation, the industry, and the specific job or role being performed. For example, some organisations may have employees work standard 8-hour shifts, while others may use shorter or longer shifts depending on their operational needs. Shift times may also vary depending on the time of day, with some organisations using morning, afternoon, or overnight shifts to accommodate different schedules or operational requirements. Shift times are important because they help to ensure that employees are scheduled to work during the appropriate times and can help to optimize productivity and operational efficiency. They may also be regulated by labour laws or other relevant regulations in order to protect the rights of employees and ensure fair and safe working conditions.

Administering records of shift time completed by employees or contractors involves a structured approach that takes into account the specific needs and requirements of the organisation. By using a reliable system, ensuring accuracy, providing training, setting clear guidelines, monitoring compliance, and addressing discrepancies, organisations can optimize their shift time recording practices and improve the accuracy and efficiency of their record-keeping processes.

Administering records of shift time completed by employees or contractors involves a structured approach that takes into account the specific needs and requirements of the organisation. The followings are some strategies to consider:

* **Use a reliable system**: Use a reliable system for recording shift time, such as an electronic or paper-based time sheet. Ensure that the system is accurate, reliable, and secure.
* **Ensure accuracy**: Ensure that records of shift time are accurate and up to date. This may involve regular audits or reviews of the records to ensure that they are complete and accurate.
* **Provide training**: Provide training to employees and contractors on how to use the system effectively. This can help to ensure that the records are complete and accurate and can reduce errors or discrepancies.
* **Set clear guidelines**: Set clear guidelines for employees and contractors on how to record their shift time. This may include guidelines on how to report absences, how to report overtime or additional hours worked, and how to report breaks or meal periods.
* **Monitor compliance**: Monitor compliance with the guidelines for recording shift time. This may involve regular audits or reviews of the records to ensure that they are being recorded accurately and in accordance with the guidelines.
* **Address discrepancies**: Address any discrepancies or errors in the records of shift time as soon as possible. This can help to ensure that the records are accurate and up-to-date and can help to avoid disputes or conflicts over pay or other related issues.

## Maintain staff rostering records according to organisational procedures.

**Staff rostering records.**

Staff rostering records are the records that organisations keep tracking and manage employee scheduling and attendance. These records typically include information about the dates and times that employees are scheduled to work, as well as any changes or adjustments that are made to the schedule over time. Staff rostering records may also include information about employee leave, such as vacation time, sick leave, or other types of time off. In addition, these records may include information about employee performance or other relevant metrics that can help organisations to evaluate the effectiveness of their rostering practices.

**Maintain staff rostering records.**

Maintaining accurate and up-to-date staff rostering records is an important aspect of effective roster management, as it allows organisations to monitor employee attendance, comply with labour laws and regulations, and optimize staffing levels and skill mix to meet operational requirements. Staff rostering records can be maintained using a variety of tools and systems, including paper-based records, electronic spreadsheets, and specialized rostering software programs. The specific format and content of staff rostering records will depend on the needs and requirements of the organisation, as well as any legal or regulatory requirements that must be met. Overall, effective management of staff rostering records is a key component of effective roster management and can help organisations to optimize their staffing practices and improve operational efficiency.

Maintaining staff rostering records involves a structured approach that takes into account the specific needs and requirements of the organisation. By using a centralized system, ensuring accuracy, storing records securely, establishing retention policies, ensuring compliance with data privacy regulations, and providing training, organisations can optimize their rostering record-keeping practices and improve the accuracy and efficiency of their roster management processes.

The followings are some organisational procedures for maintaining staff rostering records:

* Use a centralized system: Use a centralized system for maintaining staff rostering records. This can help to ensure that all relevant information is stored in a single location, making it easier to access and manage.
* Ensure accuracy: Ensure that staff rostering records are accurate and up to date. This may involve regular audits or reviews of the records to ensure that they are complete and accurate.
* Store records securely: Store staff rostering records securely to ensure that they are protected from unauthorized access or use. This may involve using password-protected systems or limiting access to the records to authorized personnel only.
* Establish retention policies: Establish retention policies for staff rostering records to ensure that they are retained for the appropriate length of time. This may involve complying with legal or regulatory requirements, as well as establishing internal policies to guide retention practices.
* Ensure compliance with data privacy regulations: Ensure compliance with data privacy regulations when maintaining staff rostering records. This may involve obtaining consent from employees to collect and use their personal information, as well as establishing policies and procedures to protect the privacy and confidentiality of employee information.
* Provide training: Provide training to personnel responsible for maintaining staff rostering records on how to use the system effectively and comply with organisational policies and procedures.

**Self-Directed Learning Task 3**

**Maintaining Rostering Records**

**Objective:** Develop proficiency in maintaining rostering records accurately and in accordance with organisational procedures. Ensure that shift time completed by employees or contractors is effectively administered and documented.

**Duration:** Allocate 4-10 hours for self-directed learning.

**Task Overview:** In this self-directed learning task, you will focus on maintaining rostering records, a crucial aspect of efficient staff management. You will learn to administer records of shift time completed by employees or contractors and maintain these records following organisational procedures.

**Task Activities:**

1. **Understanding Rostering Records:** Begin by researching and understanding the types of records associated with staff rostering. Identify the specific information that needs to be recorded, such as employee names, shift details, start and end times, and any additional relevant data.
2. **Recording Tools:** Explore the tools and systems commonly used for maintaining rostering records. This could include digital platforms, spreadsheets, or specialized rostering software. Understand the advantages and limitations of each tool.
3. **Accurate Data Entry:** Practice accurate data entry by creating sample records for employees or contractors. Ensure that all necessary information is correctly recorded and validate the data against real-world examples or scenarios.
4. **Organisational Procedures:** Familiarize yourself with your organisation's procedures for maintaining rostering records. Pay attention to any specific requirements, such as data retention periods, data security, or reporting protocols.
5. **Record Administration:** Develop a systematic approach to administer records of shift time completed by employees or contractors. Consider how you will accurately capture and verify this data.
6. **Data Integrity:** Implement strategies to ensure the integrity of your rostering records. This may include regular audits, error-checking processes, and backups.

**Reflection:** Reflect on the significance of accurate rostering records in effective workforce management. Consider how well-maintained records contribute to payroll accuracy, compliance, and decision-making.

**Evidence:** Provide evidence of your learning, including sample rostering records, an understanding of recording tools, accurate data entry practices, adherence to organisational procedures, a record administration plan, and strategies for data integrity. This evidence demonstrates your commitment to maintaining rostering records effectively and in accordance with organisational requirements.

# Section 4

# Evaluate rosters.

## Monitor effectiveness of rosters in consultation with colleagues.

Monitoring the effectiveness of rosters in consultation with colleagues involves a structured approach that takes into account the specific needs and requirements of the organisation. By soliciting feedback, reviewing performance metrics, analysing financial data, monitoring compliance with labour laws and regulations, using benchmarking data, and making adjustments as necessary, organisations can optimize their rostering practices and improve the effectiveness and efficiency of their roster management processes. Monitoring the effectiveness of rosters in consultation with colleagues is an important aspect of effective roster management, as it allows organisations to identify areas for improvement and make adjustments as necessary. The followings are some strategies for monitoring the effectiveness of rosters in consultation with colleagues:

* **Seek feedback.**

Solicit feedback from colleagues on the effectiveness of the rosters. This may involve conducting surveys, holding focus groups, or providing opportunities for individual feedback.

* **Review performance metrics.**

Review performance metrics, such as productivity levels, absenteeism rates, and staff turnover rates, to assess the effectiveness of the rosters. This can help to identify areas where the rostering practices may be contributing to positive or negative outcomes.

* **Analyse financial data.**

Analyse financial data, such as wage costs, to assess the financial impact of the rostering practices. This can help to identify areas where the rostering practices may be contributing to cost savings or cost overruns.

* **Monitor compliance with labour laws and regulations.**

Monitor compliance with labour laws and regulations to ensure that the rostering practices are in line with legal requirements and do not put the organisation at risk of legal or financial penalties.

* **Use benchmarking data.**

Use benchmarking data to compare the rostering practices with industry standards and best practices. This can help to identify areas where the organisation may be falling behind or excelling in comparison to other organisations.

* **Adjust, as necessary.**

Based on the feedback and data collected, make adjustments to the rostering practices as necessary. This may involve revising the rosters to better align with operational requirements, adjusting staffing levels or skill mix, or modifying the communication or record-keeping processes.

## Identify ways in which rosters and roster development processes may be improved and take appropriate action.

Identifying ways in which rosters and roster development processes may be improved involves a structured approach that takes into account the specific needs and requirements of the organisation. By conducting regular reviews, identifying areas for improvement, developing an improvement plan, communicating the plan, implementing the changes, and monitoring progress, organisations can optimize their rostering practices and improve the effectiveness and efficiency of their roster management processes.

Identifying ways in which rosters and roster development processes by taking into account the specific needs and requirements of the organisation. The followings are some strategies for identifying areas for improvement and taking appropriate action:

* **Conduct regular reviews.**

Conduct regular reviews of the rostering practices to identify areas for improvement. This may involve soliciting feedback from colleagues, reviewing performance metrics, analysing financial data, and comparing practices to industry standards and best practices.

* **Identify areas for improvement.**

Based on the review, identify specific areas where the rostering practices may be improved. This may include issues related to staffing levels, skill mix, communication processes, record-keeping practices, or compliance with labour laws and regulations.

* **Develop an improvement plan.**

Develop a structured improvement plan that outlines specific actions to be taken to address the identified areas for improvement. This may involve establishing clear objectives, timelines, and responsibilities for implementing the changes.

* **Communicate the plan.**

Communicate the improvement plan to relevant stakeholders, including colleagues, managers, and other personnel responsible for rostering practices. This can help to ensure that everyone is on board with the plan and understands their role in implementing the changes.

* **Implement the changes.**

Implement the changes identified in the improvement plan. This may involve revising the rostering practices, adjusting staffing levels or skill mix, modifying communication or record-keeping processes, or making other changes, as necessary.

* **Monitor progress.**

Monitor progress in implementing the changes and assess the impact on the rostering practices. This can help to identify any issues or challenges that may arise during the implementation process and adjust, as necessary.

 **Self-Directed Learning Task 4**

**Evaluating Rosters**

**Objective:** Develop skills in evaluating staff rosters for effectiveness, identify areas for improvement, and take appropriate actions to enhance roster development processes.

**Duration:** Allocate 4-10 hours for self-directed learning.

**Task Overview:** In this self-directed learning task, you will focus on the critical skill of evaluating staff rosters. You will learn to assess the effectiveness of rosters in consultation with colleagues, identify areas for improvement, and take appropriate actions to enhance the roster development processes.

**Task Activities:**

1. **Understanding Roster Evaluation:** Begin by researching and understanding the key factors that contribute to effective staff rosters. Consider factors such as labor cost, operational efficiency, employee satisfaction, and compliance with labor laws and organisational policies.
2. **Evaluating Existing Rosters:** If you have access to existing staff rosters, evaluate them based on the identified factors. Assess their efficiency, cost-effectiveness, and alignment with operational goals. Take note of any issues or areas for improvement.
3. **Consultation with Colleagues:** Reach out to colleagues involved in roster development, such as supervisors, managers, or team leaders. Conduct interviews or discussions to gather their insights and feedback on the current rosters. Identify their pain points and suggestions for improvement.
4. **Analyzing Feedback:** Analyze the feedback and insights gathered from colleagues. Look for common themes or recurring issues that need attention. Consider how these issues align with the identified factors for roster evaluation.
5. **Identifying Improvement Opportunities:** Based on the evaluation and feedback, identify specific opportunities for improving staff rosters and the roster development process. These opportunities could relate to scheduling algorithms, shift allocation, communication, or software/tools used.
6. **Action Plan:** Develop an action plan outlining the steps you will take to address the identified improvement opportunities. Consider the feasibility, timeline, and resources required for each action.

**Reflection:** Reflect on the importance of ongoing roster evaluation and improvement in optimizing operational efficiency, employee satisfaction, and cost control. Consider how your actions can contribute to these goals.

**Evidence:** Provide evidence of your learning, including your understanding of roster evaluation factors, the evaluation of existing rosters, feedback from colleagues, identified improvement opportunities, and an action plan for roster enhancements. This evidence demonstrates your commitment to evaluating and enhancing staff rosters to benefit the organisation.

Top of Form

# References

Images (n.d.) https://www.freepik.com/search?format=search&query=restaurant.