

Guidelines for introducing team-based self-rostering

These guidelines cover the key stages in introducing a team-based self-rostering scheme. They provide a brief summary and may require addition or modification in specific circumstances. The issues they touch on are dealt with at more length in the rest of the booklet. Vignettes of existing good practice - and contacts for people who are already operating schemes - are included as a separate booklet.

This package is intended to be available to all staff who have an interest in self-rostering. The experience of existing schemes is that they succeed best where all those involved are aware of the aims of the scheme and have thought through the implications for their own working lives. Communication is vital to this process.

A Powerpoint presentation of these guidelines is also included on disk with this pack.

Guidelines

- Survey staff on the principle of self-rostering. Assess scope for flexibility within the team

Checklist

- Would staff value more flexibility in their working lives?
- How will handing over control of rostering to staff affect the organisational culture?
- Will it enable provision of care to be extended or improved through more flexible working patterns?

- Develop a more detailed assessment of a self-rostering scheme

Checklist

- How will continuity of patient care be managed?
- Will it be fair to all?
- Is there sufficient diversity within the team to suggest that most will benefit from the flexibility?
- Will it help future recruitment and retention?

- Agree parameters for the scheme

Checklist

- Minimum and maximum staffing levels to be assessed for all hours
- Skill, grade and gender mix parameters to be set
- "Time Bank" limits for time owed and owing
- Agree hand-over procedures

- Compare agreed staffing levels with actual establishment

Checklist

- Is there a match between required staffing levels and staff available?
- If there is a mis-match what steps can be taken to correct it?

- Select a roster processing system**
Checklist
 - Computer suits larger, less complex teams
 - Manual system better for small teams or complex skill mixes
 - Possible future integration of computer with organisation-wide information management systems
 - IT support?
 - Locate computer or manual chart where all staff can access it
 - Manual system may take someone longer to prepare rosters.

- Run a time-limited pilot scheme (minimum three months)**
Checklist
 - Training support in using a computer for staff who need it
 - Monitor patient experience
 - Monitor staff take-up of flexibility
 - Communicate the initiative to other teams

- Review outcomes from the pilot**
Checklist
 - Do team members want it to continue?
 - Have patients or the service been affected?
 - Are modifications needed?

- Open the scheme to other teams**
Checklist
 - Is there demand for self-rostering in each team?
 - Is there scope for flexibility?
 - Are managers equipped to lead the change in culture?