

Social Care Solutions



Institute of
Health &
Social Care
Management

ROTA MANAGEMENT



Rota management principles

Managing the rota within a care setting can be time consuming and stressful. As soon as the rota is put up, it is quickly out of date. No care organisation has a perfect solution, but from working with over 1,000 care providers Florence have developed a deep understanding of both good and bad practices.

Effective rota management requires an equitable partnership between care providers and their workforce. It is important to dynamically balance the needs of the organisation with those of the individual. Should it shift too far in either direction, problems can arise.

When planning your rota, there are three key principles of rota management that help achieve this balance:

- Fairness
- Visibility
- Efficiency

Making your rota fair

The act of allocating shifts must be perceived to be fair with the burden shared equally at weekends for example. It should also be done in an open and transparent way and ideally not by the same person to avoid any conscious or unconscious bias.

Where possible employment contracts need to be consistent to allow this fair allocation. You may find this hard for legacy contracts but the needs of the business do come first if it improves the quality of care.

During induction, staff must be clearly told what is expected of them which helps them to plan accordingly. Care providers should always try to incorporate the needs of their team and recognise they have commitments outside of work, even if it does mean re-jigging the unpublished rota.

Rota changes are inevitable and any staff member that is sick or absent should be managed consistently, no matter who they are. Absence happens but poor practice can not be tolerated. It will be noticed by others and cause further issues. The best care providers act as a team.



Making your rota visible

Effective communication is at the heart of having an engaged workforce. Keeping staff updated of rota changes is critical. Rotas do change daily and the old practice of printing it out does not meet the expectations of the workforce today.

Almost everyone has a smartphone and can access any information at any time, they should be able to access their rota when they wish. Technology should form a part of any workforce strategy. Staff should be able to see their shifts at any time. The best providers facilitate this and often more.

Making your rota efficient

Managing your rota should not be a full time job but, without the right systems and processes, it can often feel that way.

Ensuring an efficient rota management system requires you to:

- Plan you rota four weeks in advance - any longer and employees find it hard to plan their personal lives, and any shorter shifts that burden to the provider.
- Create a system for handling leave requests and ask that they are submitted at least four weeks in advance
- Create a system for managing changes to a published rota
- Invest in technology to handle your rota - this is particularly useful for managing the edge cases that come up around unplanned absence and leave requests
- Ensure staff are aware of your processes and make it part of your employee onboarding

Finally, regardless of any systems or processes you have in place you will need to cover last minute gaps. This is and always has been a part of care. Some forward thinking providers have been hiring "General" Assistants. These professionals may be deployed in a variety of roles from care to laundry to other support, often varying each shift. This variety helps with both rota planning, gap covering and fortunately also increases staff engagement.

If all else fails keeping a sense of humour goes a long way!

There are also solutions available to help you. [Florence](#) is a technology company that builds workforce management solutions for social care. Their goal is to make social care staffing outstanding and effortless.





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