Allocate **Case Study**

Uniting

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Uniting grows its partnership with Allocate Software

Introduction

Uniting is a community services and advocacy arm of the Uniting Church in NSW and ACT Synod that offers not-for profit services including aged care, disability, early learning, community services and chaplaincy. With more than 8200 employees and 2200 volunteers driven by the passion to be there for others, Uniting delivers programs and services to help over 30,000 people across the state.

Challenge

Uniting currently rosters approximately 5,200 employees over 105 sites, with each site containing anywhere from a single roster up to six sub-rosters, and 24 rosters at the Hospital site.

In order to maintain accurate and equitable rosters, Uniting needed an e-rostering system based on a skills register that would accommodate shift changes and give employees some autonomy and flexibility. This system also needed to centralise the payroll functions and introduce a time and attendance system to eliminate manual timesheets.

Jacqueline Sims, employee services and people systems, Uniting, said, *"Getting the wrong combination of staff to patient care is detrimental in our industry, which is why rostering is so important to Uniting. We need to make sure we have the right*

staff in place, matching skills and experience for each shift. Overstaffing or filling shifts with people who are overqualified for the work can cost additional money as well as affecting staff satisfaction. To avoid this, we needed a solution that could work across numerous sites for a more streamlined way to get the staffing mix right every time, in every location."

Uniting also needed a solution that simplified the rostering process to help staff navigate their own rosters and cope with the constantly changing demands for shifts.

Jacqueline Sims said, *"When someone new starts, they are bombarded with on-boarding tasks. It's essential that the rostering system is easy to understand to make that process smoother and more straightforward for new recruits and existing staff. A positive on-boarding experience, combined with a streamlined rostering process, can also help improve staff retention and boost overall employee morale."*

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Solution

The implementation of Allocate's rostering solution at Uniting started with a pilot site in 2006. The pilot program was approved for release in 2007, and rolled out over the next few years. The deployment was relatively straightforward.

Jacqueline Sims said, *"We continue to work with Allocate's solution as it provides us with a user-friendly experience, which is also automated, streamlined, and industry-specific to cater for Uniting's needs."*

The solution had proved extremely successful, so the company recently elected to upgrade to the newest version of the software.

Part of the reason Uniting wanted to upgrade was to gain access to features such as the SMS messaging functionality, which sends out requests to employees for shifts. This makes it easier for available and appropriately-skilled employees to take on extra shifts and avoids situations where employees receive multiple phone calls throughout the day regarding filling shifts.

Jacqueline Sims said, *"This functionality will help Uniting roster people according to their availability and skillset as well as their personal preferences. It will automate the process so we don't have to manually intervene by ringing staff and manually updating the roster. It will mean that, even when we have to fill shifts at the last minute, we can trust we are getting the right mix of skills."*

Benefits

Since implementation, Uniting has seen numerous benefits across payroll, casual staff management and manual administration work.

"By using the system, casual staff are now easily shared across multiple sites and we have eliminated 5,200 timesheets", said Jacqueline Sims.

Using the data provided by the system, Uniting can now make better-informed decisions regarding using agency or casual staff for better cost management as well as deliver greater efficiency in terms of calculating wages, saving on administrative costs.

Jaqueline Sims adds, *"Uniting can now save money without compromising on client care by ensuring that shifts are staffed optimally without the over or under staffing. The e-rostering solution has let Uniting make work schedules more flexible and it has delivered both economic benefits and improved staff engagement".*

"Uniting can now save money without compromising on client care"

Future Plans

While Uniting has achieved significant benefits already by using Allocate's solution, it also plans to expand its use into the future.

Jaqueline Sims said, *"We are in the process of documenting staff processes and making recommendations to them about how they can best use the solution moving forward. Uniting would like to provide further training into new functionalities the latest solution provides so staff can gain maximum value from the solution."*

Over the next 16 months Uniting will be bringing on another 29 Early Learning Centres which will increase their rostered staff to 5500+ and 135 sites.