**CASE Tool 3-5: Staffing Schedule Suite**

**ABSTRACT**

This tool includes multiple staffing schedule templates to help firms ensure they have the correct manpower assigned to tasks.

This tool helps firms answer the following questions:

* What are our employees working on do-to-day and week-to-week?
* Do we have enough work to keep our people busy, productive, and profitable?
* Do we have enough staff members to complete current assignments on-time?

By effectively projecting and balancing workloads, firms can maximize employee productivity and profit by reducing employee burnout and turnover.

* Short-Term Staffing Schedule – 1- or 2-week lookahead. Three versions are included.
	+ Version A – Appropriate for firms or departments up to 8 staff members.
	+ Version B – Appropriate for firms or departments up to 17 staff members.
	+ Version C – Appropriate for large firms where many principals and project managers are charged with staffing their own projects.
* Mid-Term Workload Projection – 12-week projection to monitor project level staffing allocations. From the perspective of a project or an individual team member. In addition to ensuring that projects are adequately staffed, it can be used ensure that each staff member fully occupied but not over prescribed, while identifying who needs replacement assignments when they come in.
	+ Version A – Includes additional rates and budget tracking functionality that may be inappropriate to share with staff.
	+ Version B – Similar to Version A but without financial information that may be considered confidential.