Notes for using the UKRG capacity planning spreadsheet

Capacity Plan

1. Open the worksheet Capacity Plan (blank) and fill in all of the hours required to complete the duties in your department, as per the UKRG capacity planning Toolkit formulae and guidance document. Refer to the Capacity Plan (example) sheet for guidance if necessary.

2. Enter the number of hours of staffing resource in your department into cell F44.

3. This will calculate your staffing capacity based on your workload, showing any deficiency or surplus you have (E162), as well as the ratio of staffing resource required for production (E168) and QA (E169) duties.

Staffing Spreadsheet

1. Click on the Staffing tab at the bottom to open the Staffing worksheet.

2. To change the names of staff members from "QCM, PM, Tech1" etc to actual names, select all of the cells in the worksheet by clicking in the top left corner cell. Click on "Find and Select," then "Replace." Enter "QCM" in the top box and the name of the appropriate person in the bottom box and then click "Replace All." Repeat this for all members of staff, eg Tech1, Tech2, etc. Ensure there is a separate column in the "Available" section (Columns K – Q) for each individual staff member, and copy their name into every cell in the column for the year.

3. Adjust the formulae for staff hours allocated by their name. In the "Full Time" column (Column R), click on a cell, eg R2. The formula is effectively saying, if you see the word "QCM" allocate 7.5 hours. Ensure all full time staff members names appear in this formula, keeping the pattern the same. To add a person's name (eg Clint), type (K2:Q2="Clint")+… ensuring it is within the brackets of the formula. To save the changes to the formula, click Control + Shift + Enter. You cannot simply click the tick icon.

4. Repeat this process for part time staff in the S column

5. Calculate the daily Production hours. This will be the value in cell F42 and E158 in the Capacity Plan sheet, divided by 5 (if working 5 days per week). The result in Z8 should show the average daily production hours for your unit. If you wish to alter the daily hours so that they are busier on a particular day/ days of the week, see step 6. If production hours are consistent for each day, ensure that this figure replaces the figure in the formula of cells in column U.

For example, U2 = 19.7+3*(G2=Y)

This means the average production hours for that day = 19.7. Change the 19.7 to the value in Z8. For example, if your production hours were 100 hours per week, Z8 = **20**, therefore the formula would be: =**20**+3*(G2=Y).

Row G relates to a second dispensing session. If you type "Y" in row G it adds 1 to your daily production hours. If a second session costs 3 man ours (3 people for 1 hour), leave the

formula as it is. If it takes **2.5** man hours, then the formula in should be changed to =20+**2.5***(G2=Y).

6. To make the production hours vary from day to day, determine the number of production hours appropriate for each day of an average week. For example Monday and Friday are 25 hours, Tuesday to Thursday are 20 hours. Adjust the formulae in 5 cells, starting with a Monday and finishing with a Friday, as follows:

Monday (U5)	=**25**+2.5*(G5=Y)
Tuesday (U6)	=**20**+2.5*(G6=Y)
Wednesday (U7)	=**20**+2.5*(G7=Y)
Thursday (U8)	=**20**+2.5*(G8=Y)
Friday (U9)	=**25**+2.5*(G9=Y)

Select the 5 cells from that week, eg U5-U9 and drag the cells down the page to copy the formula for the entire year.

7. As staff have planned or unplanned absence, delete their name from the "Available" column for the appropriate dates. Based on the presence or absence of their name from these columns, the available staff will be calculated and compared to the number of production hours to determine if the staffing for that day is "OK" meaning that less than 80% of the available staff are required for production duties. If the proportion of staff allocated to production is greater than 80%, the word "Breach" will appear in column W.

The total number of days in which the department is "OK" or in "Breach" will be totalled in cells Z12 and Z11 respectively, and the proportion of days the department is compliant with the "80/20" rule is expressed in cell Z14.

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