



Queen Margaret University
EDINBURGH

Annual Leave Policy

Policy Summary:	The Annual Leave Policy provides guidance on annual leave to ensure that this is undertaken fairly and consistently across QMU
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1.0 Aims and Objectives

The aim of this policy is to provide Managers and Staff with guidance on annual leave to ensure that this is undertaken fairly and consistently across Queen Margaret University (QMU) in accordance with equality and diversity principles.

2.0 Scope of the Policy

This policy applies to all employees taking annual leave within QMU.

3.0 Monitor and Review

Human Resources are responsible for monitoring the effectiveness of this policy and supporting procedures and will conduct reviews at appropriate intervals.

Anyone who feels they have been unfairly treated or discriminated against should contact Human Resources.

4.0 Equal Opportunities

QMU is committed to equality of opportunity for all staff and it is the responsibility of all QMU employees to promote “equality and diversity” in the application of this policy ensuring that there is no discrimination on the grounds of disability, race/ethnic origin, sex/gender, age, religion, marital/family status, dependency, sexual orientation, political opinion, and economic or social status.

5.0 Responsibility for this Policy

Human Resources.

Any changes to this policy and supporting procedures will be made in consultation with appropriate bodies.

QMU reserves the right to update HR Policies in line with new or updated Employment Legislation.

6.0 Principles of Annual Leave

Annual leave is vital to enable employees to maintain an appropriate work/life balance allowing employees to rest and recuperate effectively.

QMU provides employees with annual leave provision which exceeds the minimum statutory requirement.

7.0 Annual Leave Year Dates

The holiday year at QMU starts on 1st August and finishes on 31st July each year.

8.0 Annual Leave Entitlements and Accrual

Staff Group	Full-time Annual Leave Entitlement
Academic	38
Support	31

Annual leave entitlement is pro-rated for part-time employees in accordance with the number of hours they work per week. For part-time employees, their entitlement will be provided in hours.

If an employee changes their working hours or pattern then their annual leave entitlement will be re-calculated to take account of the change.

Where an employee starts employment at QMU part way through the leave year, Human Resources will calculate their pro-rata entitlement to annual leave.

Where an employee leaves employment at QMU part way through the leave year, Human Resources will calculate their entitlement from the start of the leave year to their leaving date.

If an employee who is leaving QMU is unable to take their remaining annual leave entitlement before their leaving date, they should indicate on their Leaver Form how much annual leave will be untaken. Subject to approval from the line manager this annual leave will be paid to the employee, via the payroll, in their final pay. Payment of unused annual leave to an employee who is ceasing employment at QMU is subject to confirmation of remaining holiday entitlement balance as recorded in iTrent.

If an employee has taken more leave than the entitlement due to them from the start of the leave year to their termination date, a deduction will be made from the employee's final pay to reconcile this.

Where an employee moves from one School or Department to another within QMU, they should discuss with both their existing line manager and their future line manager whether or not they need to use any accrued existing annual leave before taking up their new appointment or if they can carry unused leave into their new position. Agreement on this will often depend on the time of year in relation to the end of the current leave year and the amount of leave the employee has untaken.

Employees continue to accrue annual leave at their normal rate if they are on a period of sick leave, maternity leave, paternity leave, adoption leave or parental leave.

Some groups of employees, such as Visiting Lecturers and Temporary employees may have their annual leave paid to them in their salary, where this is not in breach of the Working Time Directive.

9.0 Closure Days

In addition to annual leave entitlement, QMU recognises eight designated “closure days” over the Christmas and New Year period. The closure days apply to all employees of QMU, with the exception of Security Staff (in accordance with provisions made under the Framework Agreement of 2006). The closure days are determined each year in accordance with when Christmas Day and New Year’s Day falls. Employees are notified of the closure days each year..

10.0 Requesting Annual Leave

10.1 Notice of Annual Leave

Employees should make requests for annual leave as early as they possibly can to ensure that annual leave will not clash with their workload or that their work can be covered by other team members.

As a minimum, HR recommends that employees should provide notice which is twice as long as the period of annual leave they are requesting. For example, if an employee wished to request one week of annual leave then they request this two weeks prior to the annual leave start date.

It is recognised that, occasionally, employees require to request annual leave at short notice. Line managers should endeavour to accommodate such requests, based on the business and operational needs of the School or Department at the time.

Employees should not request to take more than four weeks of annual leave in one continuous block. Where an employee is requesting a period of annual leave which is for longer than four weeks, the decision to approve the annual leave would rest with the line manager and their view on whether or not the employee’s workload and service can be maintained for the duration of the leave.

10.2 Process for requesting Annual Leave

Annual leave should be requested through Employee Self Service which is provided by the HR System (iTrent). Employee Self Service can be accessed via the link below:

https://ce0011li.webitrent.com/ce0011li_ess/ess/index.html#/login

10.3 Approval/Decline of Annual Leave

Line managers will approve or decline annual leave requests via their Manager Self Service. Line Managers should respond to requests as soon as possible.

Line managers will decide to approve or decline annual leave based on the business and operational needs of the School or Department.

Where it is necessary for a line manager to decline a request for annual leave, the manager and the employee should discuss alternative dates which may be possible.

11.0 Carry Forward of Annual Leave into following Annual Leave Year

Employees are strongly encouraged to use all of their annual leave within the current annual leave year. Line managers should regularly review each employee's annual leave balance throughout the year to ensure that employees are consistently using their leave and that they do not build up an amount that will be impossible to use or unacceptable to carry forward into the next annual leave year.

Carry Forward of 10 days or less (or equivalent for part time staff)

Employees are permitted to carry over ten days (pro rata for part time staff) of annual leave into the next annual leave year without authorisation. Annual leave which is carried forward should normally be used within the first six months of the new annual leave year.

Leave outstanding within Employee Self Service (iTrent) up to a maximum of ten days will automatically be carried over at the start of the new leave year.

Carry Forward of more than 10 days (or equivalent for part time staff)

In recognition of the annual leave year starting in the middle of the traditional holiday period, employees may be permitted to carry forward more than ten days of annual leave in exceptional circumstances and with the approval of their line manager, if the additional days (over and above the standard ten days) are taken before the end of September. Exceptional circumstances may occur where, the business and operational needs of the School of Department have prohibited annual leave being taken or where the employee has been absent from work for a prolonged period and it makes common sense to allow a carry forward.

Leave outstanding within Employee Self Service (iTrent) beyond the maximum of ten days will not automatically be carried over at the start of the new leave year. Your line manager must ask Human Resources to make this change to your record manually.

In line with the Working Time Directive, all employees must use 28 days of annual leave (or pro rata equivalent) each year. Therefore, when requesting to carry forward annual leave, employees must ensure they have taken this minimum amount over the last year. Line managers must not allow carry forward of annual leave which would be in breach of the Working Time Directive.

Using leave from the following leave year

In recognition of the annual leave year starting in the middle of the traditional holiday period employees are permitted with the approval of their line manager to bring forward ten days or more from the following year if taken after 1st June.

12.0 Annual Leave and periods of Sickness Absence

When an employee is on a period of annual leave and they become ill then the days on which they are unwell are classified as sickness absence, not as annual leave. The employee should follow the normal reporting and documenting procedure as detailed in the QMU Sickness Absence Management policy and procedure.

For the days of sickness absence, the employee will be paid appropriately, in accordance with their entitlement to occupational sick pay.

Where a member of staff has been unwell during a period of annual leave they may be able to reclaim their annual leave (provided the employee has submitted the

appropriate sickness absence forms/certificates). The employee and line manager should discuss arrangements for the employee to take the missed annual leave at a later date.

Where an employee is on long term sickness absence leave, they continue to accrue annual leave at the normal rate. This can lead to a build up on annual leave which may need to be carried forward into the following annual leave year.

Where the length of an employee's period of sickness absence means that they are in a half pay or no pay situation, they may request to use annual leave to enable them to remain on full pay. Salary paid will be dependent on the employee's annual leave balance.

13.0 Long Service Award

QMU celebrates our staff who have achieved long service and recognises this by awarding additional days of annual leave as set out below.

Years of Service	Long Service Award
10 years	1 day Anniversary Leave
15 years	2 days Anniversary Leave
20 years	3 days Anniversary Leave
25 years	4 days Anniversary Leave
30 years	5 days Anniversary Leave
35 years	6 days Anniversary Leave

Anniversary Leave should preferably be taken in the member of staff's anniversary month and in agreement with the line manager. It cannot be carried forward into the next Annual Leave year, except in exceptional circumstances such as long-term authorised absence.

Anniversary Leave is a one-off non consolidated additional day/s of leave, it is not a rolling annual entitlement. For example, an academic member of staff would receive 39 days of annual leave in their 10th year but would revert to 38 days of annual leave in their 11th year of service.

14.0 Cancellation of Annual Leave

14.1 Cancellation by the Employee

Where an employee requests to cancel a period of arranged annual leave, this is normally unproblematic. However, a line manager may choose to refuse such a request if there is no other time in the annual leave year that the employee could be on holiday without seriously affecting the service provision or operational needs.

A line manager may also need to refuse a request to cancel a period of annual leave if, for any reason, the University would incur costs if the employee did not take their annual leave at the agreed time, for example, if the line manager had already bought in contracted cover for the employee.

14.2 Cancellation by the Line Manager

Occasionally, in exceptional circumstances, it may be necessary for the line manager to ask an employee to cancel a period of arranged annual leave, for example, where this is a shortage of staff in the School or Department due to sickness absence or where there is pressure on the School or Department to meet an unprecedented deadline.

Where a line manager feels it is necessary to ask an employee to cancel a period of annual leave, they will discuss all possible options and alternatives with the employee.

Appendix 1 - Working Time Directive

The Working Time (Amendment) Regulations 2003 are concerned with Health and Safety at work and tackle excessively long hours by promoting lifestyle friendly work practices.

The Working Time provisions include the following:

- An average working week must not exceed 48 hours averaged over a 17-week reference period. This limit includes all secondary employment a person may be undertaking inside or outside QMU employment.
- A daily rest period of not less than 11 consecutive hours in each 24-hour period (12 hours for young workers).
- An uninterrupted rest period of not less than 24 hours in each seven-day period or two uninterrupted weekly rest periods of 24 hours each in every 14-day period (48 hours in every seven-day period for young workers).
- A rest period of at least 20 minutes where the working day is more than six hours (or 30 minutes after 4.5 hours for younger workers). Workers are entitled to take these breaks away from their workstations.
- Adequate rest breaks where the pattern of work is such as to put the worker's health and safety at risk, in particular because the work is monotonous or the work rate predetermined.
- Full time employees have a right to 28 days of holiday in each leave year.

It is an offence for an employer not to comply with the working time regulations and may result in the employer facing an action in the magistrate's court, where the fine could be a maximum of £5,000 or a potentially unlimited fine if the case is heard in the Crown Court. The Health and Safety Executive acts as the enforcement agency.