



Annual Leave Guidance

Introduction

We are committed to ensuring a positive work-life balance for our colleagues and recognise the importance of regular breaks away from work.

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1. Purpose

The guidance aims to provide a fair approach to the process and accrual for taking annual leave, ensuring that individual needs are balanced with the School/Service operational requirements.

2. Key Principles

- All colleagues are encouraged to use their annual leave entitlement within the leave year to ensure they have period of rests and as a minimum must take the equivalent of the statutory leave entitlement (currently 28 days, pro-rata for part-time colleagues).
- The annual leave year runs from 1 September to 31 August and all colleagues can request annual leave through HR Connect.
- Annual leave should not be unreasonably refused, and all requests should be fully considered subject to operational needs and individual preferences. If there are periods throughout the year, where it is not possible for annual leave to be granted or restrictions to the number of colleagues able to be on leave, these should be clearly outlined to teams including the rationale at the start of the academic year.

- Exceptional requests for longer periods of leave, where reasonable notice has been given should be considered and not be unreasonably rejected where it is possible for the work to be covered with no impact on service delivery.
- Annual leave entitlement is pro-rated for colleagues who work part-time and who join or leave part-way through a leave year. Colleagues do not have to work for a specified period of time before being able to take annual leave.
- Annual leave should be taken in full or half days. Only in exceptional circumstances should managers exercise discretion to approve holidays in hours, for example to facilitate the use of remaining hours at the end of a leave year.
- There may be occasions when annual leave cannot be granted, and no responsibility will be taken for any holiday deposit paid or other losses incurred if an annual leave request is declined.
- A maximum of five days (pro-rated for colleagues who work part-time) can be carried forward into the following leave year.
- There may be occasions when colleagues find themselves in a negative balance. For example, when they start employment part way through a leave year and their accrued holiday entitlement does not cover holidays pre-booked. The decision to approve a negative balance is at managers discretion.
- Colleagues may request to cancel a period of annual leave and managers are encouraged to accept these requests, however there may be occasions where it is necessary to refuse a request if there is no other suitable time in the leave year that the colleague could be on holiday without impacting the service provision.
- Colleagues can be expected to use any outstanding annual leave entitlement prior to leaving, however managers have the discretion to authorise the payment of outstanding annual leave, subject to budget and operational needs. In the event where taken leave is in excess of the annual leave entitlement accrued, a pro-rated adjustment will be made and deducted from the final salary payment.
- Where colleagues work patterns include a Saturday and/or Sunday and they are unable to work when the University is closed. These days are not part of the fixed leave entitlement and should be requested through HR Connect which results in a deduction from annual leave entitlement.

3. Responsibilities

Colleagues

- Plan annual leave throughout the leave year and aim to use all your annual leave entitlement during the leave year period.
- Try to have at least one full two week break each year away from work.
- Request annual leave in full or half days providing as much notice as possible, so that service levels can be maintained.
- Discuss any last-minute requests for annual leave with your manager, to see if they can be accommodated.
- Inform your manager at the earliest opportunity if you are going to be late returning from leave, due to unforeseen circumstances.

Managers

- Consider and respond to annual leave requests, promptly, taking into account individual preferences, services needs and cover.

People Team

- If you are declining a request, provide an explanation of the rationale why.
- Review and monitor annual leave of teams to ensure that annual leave entitlement is being taken and that holidays are planned throughout the year.
- Provide advice on the application of the policy to both colleagues and managers. Call the team on x3344 or email humanresources@napier.ac.uk.

4. Annual Leave Entitlements

The table below shows full time annual leave entitlement comprising personal holiday and fixed leave entitlement for all colleague groups based on full-time hours:

Employee Group	Personal Holiday Entitlement		Fixed Leave Entitlement		Total Entitlement
	Days	Hours	Days	Hours	Hours
Professional Services Colleagues & Senior Managers	31 days	217 hours	10 days	70 hours	287 hours
Academic HE2000 / Research Colleagues	36 days	252 hours	10 days	70 hours	322 Hours

The standard fixed leave days are Christmas and New Year (8 days); Good Friday (1 day); and Easter Monday (1 day).

If a fixed leave day falls on a normal working day, the contracted hours will be deducted from the annual leave balance. If a colleague does not normally work on that day, no hours will be deducted from their entitlement.


The dates and days of the week that fixed leave days fall can vary from year to year, so the hours deducted from annual leave entitlements may vary slightly each year. Fixed leave days for the upcoming year can be found on the intranet.

How to calculate leave for other contract types, is available at Appendix A.

5. Carrying Forward Annual Leave

In very exceptional circumstances, colleagues may be able to carry forward more than five days to the following leave year if there has been a business reason which has precluded a colleague from taking their annual leave entitlement in a particular leave year, subject to the approval of the Dean/Director.

6. Annual Leave and Sickness Absence



Colleagues who are ill during a period of pre-booked personal holiday may reclaim days lost through sickness if they inform their manager on the first day of the absence. The manager will then cancel the personal holiday days and open a sickness absence on HR Connect. Colleagues must then keep in regular contact in line with the Managing Attendance Policy including the provision of fit notes, as required. Absences should be closed on their return to work. Periods of annual leave lost due to illness cannot be reclaimed retrospectively.

If a colleague is ill on a day they would not normally work (e.g. a fixed leave day or a university closure day), they cannot reclaim this day, as this is in effect a non-working day. Colleagues on sick pay during fixed leave or University closure days do not lose sick pay entitlement as the HR system overlooks those days as non-working days when calculating sick pay entitlement.

Annual leave entitlement continues to accrue during periods of sickness absence, and it is expected that it will normally be taken in the leave year it is accrued. However, if a colleague has been unable to take their statutory annual leave entitlement by the end of the leave year, they can carry their untaken statutory leave only (28 days, pro-rata for part-time colleagues) into the next leave year.

7. Annual Leave Accrual during periods Maternity, Adoption & Shared Parental Leave

Annual leave entitlement will continue to accrue during any period of maternity leave, adoption leave or shared parental leave. It is not possible for a colleague to take annual leave during any of these types of leave so annual leave should be taken either before, or after the period of leave.

Colleagues are encouraged to use any untaken annual leave, including any that will accrue during their period of leave up to the end of the leave year before their period of leave commences. Annual leave accrued should be taken as soon as practical upon return.

Appendix 1 – Examples of Calculating annual leave entitlement

Colleagues who work part of a leave year

Annual leave entitlement for a full-time colleague who works part of a leave year is calculated as follows:

- Full time personal holidays entitlement in hours x (total days service in the first year/ 365 days)

For example, the total annual leave entitlement for the first year of employment for a full time professional services colleague who joins on 1 October is 263.5 (rounded to the nearest 0.25 hours)

- 217 hours (full time personal holiday entitlement based on 31 days) x (335 (total days between 1 October and 31 August) / 365) = 199.25 hours per year
- 70 hours (full time fixed leave entitlement based on 10 days) x (335 (total days worked between 1 October and 31 August) / 365) = 64.25 hours per year

Full time fixed leave entitlement in hours x (total days service in the first year / 365 days)

Colleagues who work part-time for part of a leave year

- Full time personal holiday entitlement / hours in a full-time week x contracted weekly working hours.
- Full time fixed leave entitlement / hours in a full-time week x contracted weekly working hours.

Then for part time, part year:

- Total part-time personal holiday x (total days service in the first year / 365 days)
- Total part-time fixed holiday x (total days service in the first year / 365 days)

For example, the total annual leave entitlement for a Professional Services colleague who works 28 hours per week is 229.5 hours (rounded to the nearest 0.25 hours)

- 217 hours (full time personal holiday entitlement based on 31 days) / 35 (hours in a full-time working week) x 28 (contractual weekly working hours) = 173.5 hours per year
- 70 hours (full time fixed leave entitlement based on 10 days) / 35 (hours in a full-time working week) x 28 (contractual weekly working hours) = 56 hours per year

If the Professional Services colleague worked part year from 1 September until 31 March then they would be entitled to 133 hours.

- 173.5 hours x (212 total days between 1 September and 31 March) / 365 = 100.5 hours
- 56 hours x (212 total days between 1 September and 31 March) / 365 = 32.5 hours

Colleagues working compressed hours

For example, a colleague who works the equivalent of a full-time week on 4 days would work 35 / 4 = 8.75 hours per day. The actual daily deduction from their annual leave entitlement will vary according to their work pattern.

The work pattern of a colleague who works compressed hours is made up of longer hours over fewer days so their daily working hours will vary for the number of hours in a standard day.

When a fixed leave day falls on a non-working day, annual leave entitlement is not reduced for that day and hence is available to be booked as a personal holiday. The value will vary, depending on how the fixed holiday dates fall in that leave year.

Flexible working patterns

Where a colleague works truly flexibly, they will be set up with a 'notional work pattern' on HR Connect. This work pattern assumes that they work 5 days per week and divides the contractual hours evenly across the days. If a better fit solution can be agreed with the colleague/manager, then it will be applied.

Annual leave entitlement for security staff

Security staff work 40 hours per week, so the following calculation is used to calculate their personal holiday entitlement: $40 / 35$ (hours in a standard full-time week for colleagues) $\times 31$ days $\times 7$ hours = 248 hours per annum

Annual Leave Entitlement for Annualised Contracts

Annualised hours contract accrues annual leave at the equivalent rate of a permanent colleague. Their pro-rated annual leave is calculated based on number of hours worked and is available to book time off or is paid in twelve equal payments during the year, dependent upon your contractual terms.

Annual Leave Entitlement for Guaranteed Hour Lecturers

Guaranteed Hour Lecturers accrue annual leave at a rate equivalent to the annual leave entitlement of a permanent lecturer. Their pro-rated annual leave entitlement is calculated based on the hours worked in the month and is paid each month. Annual leave does not accrue during periods of unpaid leave.

Annual leave entitlement for casual workers

Casual workers are eligible to receive statutory annual leave entitlement which accrues during their employment.

Statutory leave entitlement is 5.6 weeks which is equivalent to 12.07% of hours over a year (52 weeks – 5.6 weeks = 46.4 weeks / 5.6 weeks = 12.07%). 5.6 weeks are excluded from the calculation as the worker could not be at work during those 5.6 weeks in order to accrue annual leave. Annual leave entitlement accrues at the rate of 12.07% based on the hours worked and is paid in addition to their hourly rate.

Annual leave entitlement for agency workers

Agency workers receive an equivalent annual leave entitlement to a comparable permanent colleague once they have completed an assignment of 12 weeks. Prior to the completion of 12 weeks service, they will receive their statutory holiday entitlement.

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