

# Leave Management Procedure

## Section 1 - Purpose / Objectives

**NOTE: This Procedure is currently under review. Academic or Professional staff should refer to the [Victoria University Enterprise Agreement 2019](#) and TAFE staff should refer to the [Victoria University Vocational Teacher Enterprise Agreement 2019](#) for their current Leave options.**

(1) By adopting a proactive and consistent approach to the management of Annual Leave and Long Service Leave (LSL), the University will be better placed to ensure staff have a suitable work/life balance and ensure the leave liability, both operationally and financially, is more effectively managed, without incurring additional costs associated with delays in taking accrued leave.

## Section 2 - Scope / Application

(2) This Procedure relates to the management of Annual Leave and Long Service Leave only.

## Section 3 - Definitions

(3) Nil

## Section 4 - Policy/Regulation

(4) [Leave Policy](#)

## Section 5 - Procedures

(5) Managers are responsible for considering and balancing operational and individual needs when planning for and/or approving leave and educating staff about the additional costs incurred when the taking of leave is delayed.

(6) Managers are required to monitor their employees' leave balances via quarterly reports provided by People and Culture and via HR Zone and address excessive leave balances as per the procedures.

### Annual Leave

(7) Employees are expected to take their annual leave in the year it is accumulated.

(8) Annual leave balances are to be reviewed on a quarterly basis by managers and supervisors based on information provided by People and Culture.

(9) Managers and supervisors are responsible for ensuring that planning with staff members to utilise leave forms part of the annual workload planning process for academic staff, the work plan process for TAFE Teaching staff and the annual SPDP planning process for general staff.

(10) Managers and supervisors are required to be mindful of the impact on leave balances of employees when reducing their work time fraction, and plan leave accordingly.

(11) Those employees with balances that are within one week of the maximum leave balance as stipulated in the relevant Industrial Agreement must develop a leave plan in conjunction with their manager/supervisor to ensure they do not exceed the maximum balance.

(12) Those employees with leave balances equal to or greater than the maximum allowable balance must have a leave plan in accordance with the procedures stipulated in their relevant Industrial Agreement and as detailed in this procedure.

(13) All arrangements entered into to reduce leave balances to below the maximum balance must take into account the ongoing accrual of annual leave entitlements.

(14) Employees may be able to utilise up to a maximum of 1 week in advance (negative annual leave balance) subject to manager or supervisor approval. This is on the understanding that they will need to repay any excess leave taken should their employment with the University end before the leave has been accrued.

(15) Employees are not able to undertake paid work for the University, in any capacity, during their normal working hours whilst on annual leave.

## **Long Service Leave**

(16) LSL balances are to be reviewed on a quarterly basis by managers and supervisors based on information provided by People and Culture.

(17) Employees identified with leave balances equal to or greater than the maximum allowable balance as stipulated in the relevant Industrial Agreement or within this procedure are to be directed to take LSL to reduce their balance to below the maximum allowable balance. This process is in accordance with the procedures outlined in the relevant Industrial Agreement and detailed below.

(18) Employees are not able to undertake paid work for the University, in any capacity, during their normal working hours whilst on long service leave.

## **Part A - Management Practice: Professional and Academic Staff**

### **Annual Leave**

(19) People and Culture provides managers and supervisors with quarterly reports detailing the annual leave and LSL balances of all ongoing and fixed term staff within their organisational unit. Leave balance information is also available to managers and supervisors via HR Zone. Based on leave balance information provided by People and Culture the following procedures must be complied with.

(20) Good leave planning should ensure that staff members are encouraged to take four weeks leave in the year in which the leave accrues. Where a staff member's leave balance begins to exceed four weeks, managers and supervisor should engage in leave planning conversations to ensure the balance does not grow to excessive levels and educate staff about the additional costs associated with the deferral of accrued leave.

(21) Where an employee has a balance of between 6 and 7 weeks the manager or supervisor must notify the employee of the requirement to take leave to ensure the balance does not exceed 7 weeks. Under the EA employees are not able to accrue leave of more than 7 weeks unless approved on the grounds of "exceptional circumstances". Where an employee has a balance of 7 weeks or more the following applies:

- a. The manager or supervisor will direct the employee in writing to take leave that will see the balance reduced to not more than 7 weeks within the following timelines (from the date of written notification):
  - i. Balance of 7 to 8 weeks: 3 months
  - ii. Balance of 8 to 9 weeks: 6 months
  - iii. Balance of 9 to 10 weeks: 9 months
  - iv. Balance of 10 weeks or more: 12 months
- b. The manager or supervisor is to provide a copy of the written direction to People and Culture so that the applicable leave entry is recorded on the HR system.

### **Long Service Leave**

(22) Where an employee has a LSL balance of 18 weeks or more the manager or supervisor is required to direct the employee in writing to take LSL to reduce the balance to below 18 weeks within the following parameters as provided in the EA:

- a. The commencement date of the period of LSL must be within 12 months from the date of the written direction.
- b. This will not apply to employees who are within 2 years of intended retirement date. Intended retirement is to be established through notification from the employee on their intended retirement date.
- c. Employees who have been directed to take LSL are not able to be directed to take LSL again until after a period of 2 years from when they return from their previous period of directed LSL.
- d. The manager or supervisor is to provide a copy of the written direction to People and Culture so that the applicable leave entry is recorded on the HR system.

## **Part B - Management Practice: TAFE Teaching Staff**

### **Annual Leave**

(23) Consistent with the [Victoria University Vocational Teacher Enterprise Agreement 2019](#), annual leave shall be taken within 15 months of being accrued unless otherwise agreed by the employee and the University.

(24) Where an employee has an annual leave balance of between 4 and 5 weeks the manager or supervisor must notify the employee in writing of the requirement to take leave to ensure the balance does not exceed 5 weeks.

(25) Where an employee has a balance of 5 weeks or more the following applies:

- a. The manager or supervisor will direct the employee in writing to take leave that will see the balance reduced to below 5 weeks.
- b. The manager or supervisor is to provide a copy of the written direction to People and Culture so that the applicable leave entry is recorded on the HR system.

### **Long Service Leave**

(26) Where an employee has a LSL balance of 18 weeks or more the manager or supervisor is required to write to the employee to request the employee formulate a leave plan with the manager or supervisor to take LSL to reduce the balance to below 18 weeks.

(27) An employee shall not unreasonably refuse to formulate a leave plan as outlined in the above paragraph. If no leave plan has been agreed within 4 weeks of the manager or supervisor's written request, the manager or supervisor may direct the staff member to take LSL at a particular time to reduce the balance to below 18 weeks by giving the staff member 3 months written notice.

(28) The manager or supervisor is to provide a copy of the written direction to People and Culture so that the applicable leave entry is recorded on the HR system.

## Status and Details

<b>Status</b>	Historic
<b>Effective Date</b>	1st December 2015
<b>Review Date</b>	22nd May 2020
<b>Approval Authority</b>	Vice-Chancellor
<b>Approval Date</b>	12th October 2015
<b>Expiry Date</b>	30th July 2021
<b>Accountable Officer</b>	Simone Wright Chief Human Resources Officer 9919 5447
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