

Annual Leave Policy

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Annual Leave Policy

Version Control Sheet

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|-----|----------|---|----------------------------|
| 1 | | New Policy. Approved at JCNC May 2009 | Local Agreement |
| 1.1 | | Review date extended to 31 March 2011 to coincide with NHS/LCHS changes | Sheila Manning |
| 1.2 | 04.03.11 | Amendment to Section 10 Example 2 | Rachel Ellis-Ingamells |
| 1.3 | 22.03.11 | Policy realigned following the implementation of the Transforming Community Services agenda and the new legal entity | Rachel Ellis-Ingamells |
| 1.4 | 09.2011 | Policy review date to be extended | Rachel Ellis Ingamells |
| 2 | 01.2012 | Changed name to Annual Leave Policy – removed the wording ‘inclusive’ Removed paragraph that referred to the plan to introduce Buying and Selling of annual leave Removed paragraph that referred to future House of Lords judgement regarding claiming annual leave following a period of long term sick leave | Melanie O’Brien |
| 2.1 | 07.2014 | Updated equality statement in line with legislation | Karen Stinson |
| 2.2 | 02.2015 | Change of CE name and extension Extension agreed to May 2015 to allow for changes | Employment Policy Group |
| 3 | 04.2015 | Minor amendments throughout sections 2,5, 7, 8, 11, 13, 14 Removed 2 annual leave | Laura Herrick |
| 4 | 01.2017 | Term time removed. | Sophie Coutts – HR Advisor |

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|-----|------------|---|----------------------------|
| 4.1 | March 2017 | Annualised hours calculation amended. Starters/leavers calculation removed and annual leave calculator referenced. Equality and Human Rights Lead updated. Section 2 of equality analysis removed as not utilised. Dental removed. Training removed as course not available. 6.1 table clarified based upon reckonable service. Manager responsibility to calculate leave | Sophie Coutts – HR Advisor |
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Annual Leave Policy

Policy Statement

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| Background | The purpose of this policy is to implement a coordinated and uniform approach to the taking of Annual Leave which applies to all members of staff within the remit of their current contractual agreement. |
| Statement | <p>The organisation supports the enhancement of a work-life balance for all staff where it is important to promote consistency and equality, ensuring that there is no discrimination or inequality which may affect one group to benefit less than other groups.</p> <p>Annual leave will be inclusive and pro rata of 8 bank holidays and will be accrued and taken in line with this policy so as to ensure that all staff whether part time or full time, flexible or non-flexible have consistent and equal entitlements.</p> |
| Responsibilities | Manager must ensure that individual needs are balanced with service needs and ensure there is an agreed and clearly understood local protocol. Compliance with the policy will be the responsibility of all staff. |
| Training | Specific training is not necessary. All staff should make themselves familiar with this policy. |
| Dissemination | Website |
| Resource implication | Annual Leave is an important aspect of the staffing budget and the necessity to be able to provide cover needs to be taken into account when determining establishment and in workforce planning. |

1. Introduction

- 1.1. Inherent within all of its practices Lincolnshire Community Health Services NHS trust is committed to the principles of diversity, equality of treatment and equality of opportunity and believes that direct or indirect discrimination against any person is unacceptable.

This policy aims to ensure that no employee receives less favourable treatment on the grounds of age, disability, religion or belief (or lack of religion or belief), gender, sexual orientation, marriage and civil partnership, transgender (gender reassignment), pregnancy and maternity or trade union membership, or is disadvantaged by any conditions or requirements which are not justified by the job.

- 1.2. This policy covers all members of staff within the remit of their current contractual agreement. Medical staff are covered under their own Terms and Conditions.
- 1.3. The principles underlying this policy are to:
- Support a positive and healthy work-life balance for staff
 - Promote consistency and equity across the organisation
 - To ensure that annual leave is accrued and taken in line with a corporate policy.
 - To ensure that individual needs are balanced with service needs.
- 1.4. Staff should have the opportunity and be encouraged to take annual leave spread across the year.

2. Annual Leave Year

- 2.1. The annual leave year is 1 April to 31 March.

3. Taking Annual Leave

- 3.1. Managers should ensure that staff are enabled to take their annual leave; however individuals have a responsibility to plan their annual leave and agree it with their manager.
- 3.2. Departments should ensure that all staff are aware of this policy and any departmental/service protocols which should clearly state in writing:-
- who is authorised to agree annual leave (normally the line manager)
 - time-scales for requesting and agreeing annual leave
 - any operational rules that may apply to ensure adequate cover is maintained
- 3.3. Departmental operational arrangements will seek to balance the needs of staff members and the needs of the service fairly, and will not be unduly restrictive.
- 3.4. All leave must be authorised before being taken.

4. Cancellation of Annual Leave

- 4.1. In an emergency only, managers may, in negotiation with an employee(s), cancel annual leave in the interests of patient care – e.g. major clinical incident, pandemics, red alerts according to the major disaster emergency plan.
- 4.2. Where this has to be done every effort will be made to minimise any inconvenience for the staff member and in such extreme circumstances the employee may be reimbursed for any unavoidable financial loss incurred in respect to reasonable holiday expenses. The annual leave will be carried over to be taken as soon as possible.

5. Late Return from Holiday

- 5.1. If for any reason an employee cannot return from annual leave on the agreed date, they must inform their line manager as soon as possible to provide details of the nature of the problem and the likely date of return. Failure to do so will mean that any extra days not worked will be classed as unauthorised absence and a breach of contract subject to the disciplinary procedure. Where there is a reasonable explanation then the manager may agree that the employee can take additional annual leave, time in lieu or unpaid leave.

6. Contractual Entitlement

- 6.1. Agenda for change provisions

| Length of service | Annual leave + General Public Holidays | Conversion to hours (Full Time) |
|-----------------------------------|--|---------------------------------|
| On appointment with NHS/Trust | 27 days + 8 days | 202.5 hours + 60 hours |
| After 5 years reckonable service | 29 days + 8 days | 217.5 hours + 60 hours |
| After 10 years reckonable service | 33 days + 8 days | 247.5 hours + 60 hours |

- 6.2. Medical staff entitlement will be in accordance with their specific Terms and Conditions and individual contracts.
- 6.3. The organisation's policy is to determine annual leave entitlement in hours rather than days for all staff regardless of whether the employee is full-time or part time. Bank Holidays are included pro rata within this total entitlement for all staff. The benefit for all employees in calculating entitlement in hours is that this ensures equity for all by ensuring that staff who work variable hours/shifts do not receive either more or less leave than colleagues who work a more standard pattern. It is the manager's responsibility to ensure that annual leave is calculated correctly and action any changes based upon an increase in the length of service or change in hours by utilising the annual leave calculator accessible on the staff intranet useful documents.
- 6.3. The chart of annual leave entitlements pertaining to all staff is attached, as appendix 2. Hours should be rounded up or down to the nearest 0.5 decimal point. (i.e. the nearest 1/2 hour) See Appendix 1 for calculations of annual leave for Agenda for Change employees working annualised hours. For term time or annualised hours calculations please contact Workforce Services. See Appendices 2 and 3 for Agenda for Change

inclusive annual leave chart and Agenda for change inclusive annual leave calculator

- 6.4. When a member of staff on Agenda for Change reaches five or ten years' reckonable service, their increased leave entitlement will start immediately from the anniversary date and is calculated on a pro rata basis for the remainder of that leave year.

7. Bank Holidays

- 7.1. A Bank Holiday day is defined as a period of normal duty that starts within the period of 24 hours from midnight to midnight on the following days:-

| | | |
|---------------------|---------------------|----------------|
| Christmas Day | Boxing Day | New Year's Day |
| Good Friday | Easter Monday | May Day |
| Spring Bank Holiday | August Bank Holiday | |

- 7.2. All employees will be entitled to 8 paid Bank Holidays in the leave year which will be calculated (on a pro rata basis for part-time employees) in hours using the "5 day" formula which determines average hours per day over a working week (see example below). This will then be added to the individual's basic annual leave entitlement to give the total inclusive annual leave entitlement as per the chart (Appendix 1). There will be some annual leave years where more or fewer than eight Bank Holidays fall within the leave year because the Easter holidays can be in March or April. Annual Leave for this reason only can be carried over or taken from the next year's entitlement in order to accommodate this.
- 7.3. Staff who start or leave part-way through a leave year will still be entitled to pro rata of the bank holidays regardless of whether or not they fall within their period of employment.

Example:- people working 22 hours per week will be entitled to 22 divided by 5 (average hours per day) multiplied by 8 Public Holidays which equals 35.2 hours extra pro rata for Public Holidays which is incorporated in the total entitlement of 154 hours in the chart.

- 7.4. Where an employee is not rostered as part of their weekly pattern to work a Public Holiday, then no deduction needs to be made from the individual's total leave entitlement.
- 7.5. If an employee normally works a day on which a Public Holiday falls but is not required to work e.g. a clinic is closed then they must deduct the hours they would normally work on this day from their leave entitlement. It is important that any differences between hours rostered and hours deducted for public holidays are clearly identified on the timesheets and on annual leave record cards.
- 7.6. Where possible and in agreement with managers employees may work on Bank Holidays if they choose, either at home or in a designated work area which can be securely accessed on Bank Holidays. However enhanced payments will only be made if these are requested by the manager – where the choice is the individuals then flexi-working principles will apply (see Flexible Working Opportunities Policy).
- 7.7. The benefits of doing this include:-

Consistency in approach regardless of profession or staff group
Consistency across all service areas
Religious considerations for all faiths or non-faith
Ease of planning 24/7 service
Ease of planning during peak periods.

8. Calculation of Reckonable Service

- 8.1. All verified previous period(s) of NHS service will be aggregated i.e. any period of time that has been worked in the NHS, regardless of whether or not there has been a break in service, will count as reckonable service for annual leave.
- 8.2. The organisation has local discretion to take into account any period of employment outside the NHS where it is judged to be relevant to the new post. Therefore for the purpose of calculating annual leave only consideration may be given for service outside the NHS (including work abroad) taking into account the knowledge, skills and experience the post holder is transferring into the NHS e.g. a staff nurse formerly employed by a private GP practice transferring the skills to work in the NHS.
- 8.3. Service in other organisations may only be recognised subject to approval by Workforce and the relevant Manager.

Non-reckonable service:

Locum agency and temporary agency service will not count as reckonable service.
Time spent on an agreed career break will not count as reckonable service in respect of annual leave.

9. Verification of Reckonable Service

- 9.1. The organisation will verify as much previous NHS service as possible; for example information may be sought from previous NHS employers including previous verified reckonable service and / or previous annual leave entitlement.
- 9.2. Where it is not possible for the organisation to confirm previous NHS service (e.g. a previous NHS employer no longer exists) the individual will need to provide satisfactory documentary evidence of that period of employment. Staff will need to provide satisfactory evidence of any non-NHS reckonable service.

Evidence may include the following:

Staff Transfer form
Inter Authority Transfer
Employment contract and/or payslips
Pension records
P60s
P45s
Reference from previous line manager

- 9.3. Providing false evidence will be dealt with under the organisation's Disciplinary policy. The evidence must be verified before the reckonable service can be confirmed and additional annual leave granted.

10. Entitlement on Joining

- 10.1. Under Section 7 of the Working Time Regulations 1998, an employee accumulates annual leave from the first day of their employment. Joiners commencing part way through a leave year will therefore receive a pro rata entitlement based on the proportion of the leave year they work.

This is calculated using the starters tab of the LCHS annual leave calculator and inserting number of days remaining in Financial Year into point 3 for a part year calculation.

11. Entitlement on Changing Contracted Hours

- 11.1. Annual leave entitlement will be calculated on a pro-rata basis as above i.e. based on completed time on the new and the old contracted hours added together to give the full year entitlement. Managers should ensure that an EF2 is completed in relation to any change in hours. Where employees transfer between departments it is the line-managers responsibility to inform the new manager of how much leave has been taken and any that has already been approved and ensure the new manager receives the annual leave card.

12. Entitlement on Leaving

- 12.1. When an employee leaves the organisation, they are entitled to be paid for any annual leave accrued and not taken. This is calculated pro rata according to the proportion of the leave year which has already expired as at the termination date
- 12.2. Where leave is owed to the employee, the last working day will be recorded but the termination date extended to pay any leave days owing, unless the excess leave can be taken before. This is important as these days are taken into account for pension reckoning and NI payments.
- 12.3. Where a leaver has taken more annual leave than their entitlement on leaving, all monies owing to the organisation will be deducted from their final salary. If the final salary is not enough to cover monies owing, the employee will be required to repay these monies.
- 12.4. The line-manager must ensure that the annual leave calculations are correct and clearly stated on the EF3 to show whether or not too much leave has been taken.

Entitlement on leaving is calculated using the leavers tab of the LCHS annual leave calculator and inserting the number of days worked in Financial Year into point 3 for a part year calculation.

13. Carry Over of Leave

- 13.1. The organisation expects that within the annual leave year staff should be provided with the opportunity to take all their entitlement of annual leave. In exceptional circumstances, and with the express pre-agreement of the Manager, up to one week

only (equivalent to pro rata working days) of basic contracted hours may be carried over to the following annual leave year.

- 13.2. Where carry over of annual leave has been agreed as above, arrangements must be made for this annual leave to be taken within the first 3 months of the annual leave year i.e. before 30 June.
- 13.3. Employees cannot sell (be paid for) or buy any annual leave hours except when leaving employment or in exceptional cases as agreed by the Head of Workforce.

14. Sickness Occurring During Annual Leave

- 14.1. If an employee falls sick whilst on annual leave then the Sickness Notification and process as outlined in the Managing Ill Health and Absence Policy and any local departmental procedures should be followed. In this case the period covered will be treated as sickness absence and the employee will be able to take the annual leave another time. Self-certification or a doctor's certificate will be required in line with any other period of sickness before annual leave is reimbursed.
- 14.2. Annual Leave will not be reimbursed where the correct notification procedure is not followed.

15. Annual Leave Accrual During Absences

- 15.1. Sickness absence - Where a member of staff is absent due to sickness during part of the holiday year they will continue to accrue all their contractual holiday entitlement for any periods of absence regardless of whether they are receiving full, half pay or no pay. During any periods of long term sickness absence, annual leave will be accrued in line with the statutory entitlement.
- 15.2. Where any employee is unable to take all of their statutory leave entitlement (28 days/5.6 weeks including bank holidays, pro rata for part time staff) due to sickness absence, they are entitled to carry this leave forward into the next leave year where there is not sufficient numbers of working days remaining in the current leave year.
- 15.3. When calculating the amount of statutory annual leave an employee has taken, account should be taken of all annual leave days and bank holidays days taken.
- 15.4. Maternity/Adoption/Paternity Leave/Parental Leave - Annual leave entitlement will continue to accrue at the contractual level during maternity, adoption leave, paternity and parental leave, whether paid or unpaid. It should be noted that the carry-over of leave into the next leave year will be in accordance with Section 13. For employees whose leave will take them into the next holiday year arrangements should be made for them to take leave for the current year before they start their maternity /adoption / paternity leave or parental leave period. Where this is not possible due to service need, amount of annual leave to be carried over, should be discussed and agreed between the manager and employee at an early stage and confirmed in writing.
- 15.5. Annual leave during suspension / disciplinary proceedings - During a period of suspension annual leave will continue to accrue at the contractual level. A suspended employee may request to take annual leave during a period of suspension and

agreement must be given by the suspending officer before the annual leave is taken. Consideration will be given to individual circumstances, for example where a staff member booked a holiday before suspension began.

- 15.6. If an employee is dismissed following a disciplinary hearing any period of suspension should be counted for the purpose of calculating annual leave entitlement.
- 15.7. Annual leave during career breaks - All accrued annual leave must be taken before commencement of the career break. No payment in lieu of outstanding leave will be made nor any carry over of leave allowed. Annual leave will not be accrued during a career break.

16. Extended Period of Annual Leave and Unpaid Leave

- 16.1. In exceptional circumstances, additional leave days (i.e. more than the 5 days allowed in Section 13) could be carried over for a pre-determined and agreed period of extended leave in the following leave year only.
- 16.2. The maximum length of annual leave to be taken consecutively will normally be 2 weeks, however occasions may arise when an employee wishes or needs to take an extended period of annual leave i.e. all or most of their entitlement at once. Managers should give consideration to any such requests and not refuse them unreasonably but must consider the health and well-being of employees and seek to ensure that the employee has regular planned annual leave/ time off throughout the rest of the year. Managers will need to clarify the local expectations and procedure in relation to the needs of the service, the amount of notice required and handover issues.
- 16.3. There may be circumstances when it is appropriate for a manager to allow an individual to take unpaid leave in addition to annual leave. Examples include where an employee has just joined the organisation and has a pre-booked holiday for which they would not have enough annual leave entitlement, or to enable an employee to take an extended period of annual leave. The employee's paid annual leave entitlement should be used up first.

17. Working during annual leave

- 17.1. Annual leave provides employees with a chance to recuperate and the Trust actively promotes health and wellbeing with staff taking all of their annual leave entitlement within the leave year. Employees should not work during this time, either for the Trust, an alternative employer or in self-employment (this includes bank shifts). In the event that operational reasons require the employee to work, the annual leave should be cancelled and taken at a later date as outlined in section 4.

18. Death during Service

- 18.1. Where an employee dies in service their annual leave entitlement will be calculated as set out in Section 12 - Entitlement on Leaving.

18.2. Where there are monies owing to the deceased for outstanding annual leave not taken the monies will be payable to their estate.

18.3. Where the deceased has taken too much annual leave, the organisation will not seek to recoup this amount.

19. **Associated Policies**

Special Leave Policy

Career Break Policy

Working Time Regulations Policy

Flexible Working Opportunities Policy

Your Attendance Matters (including ill health and absence) Policy

Family Leave Policy

20. **Local Agreement Statement**

This Policy has been jointly agreed by Management and Trade Unions/Professional Organisations in partnership for implementation of locally agreed terms and conditions.

Signature

Date:

Employment Policy
Development Manager

Staff Side Chair

Appendix 1 Annualised Hours and Compressed Hours

LEAVE ENTITLEMENT FOR ANNUALISED HOURS CONTRACTS

For term time or annualised hours calculations, please contact Workforce Services

Annualised hours involve looking at the working time in terms of the number of hours worked in the year rather than in a week. An annualised hours contract is therefore one in which a member of staff works a set number of hours over a one year period. This means that person is committed to working 52.1428 weeks, less annual leave and general public holidays.

To calculate the annual hours, annual leave and general public holiday entitlement should be converted to hours using the tables in Appendices 2 and 3

In order to calculate how much they should be paid, their whole time equivalent, or WTE, should be calculated as follows:

A standard calendar year is defined as 52.1428 weeks, which is multiplied by the full time hours per week of 37.5

$$52.1428 \text{ weeks} \times 37.5 \text{ hours} = 1955.36 \text{ hours per annum}$$

Annual leave and general public holidays are subtracted from the above hours to get the total number of actual hours worked per year by a full time person (here calculated from an entitlement of 27 days annual leave per annum):

$$1955.36 - (27 + 8) \times 7.5 \text{ hours} = 1955.36 - 262.5 \\ = 1692.75 \text{ hours per annum actually worked}$$

An annualised hours worker's actual hours are then expressed as a proportion of a full time person's hours in order to obtain the WTE.

Annualised hours workers work:

$$37.5 \text{ hours} \times 39 \text{ weeks} = 1462.5 \text{ hours per annum worked}$$

The proportion of the annual hours worked by a whole-time worker is therefore:
 $1462.5 \text{ hours worked whole-time} / 1692.75 \text{ annualised hours worked} = 0.86$
WTE

Therefore each week the annualised hours workers would receive $37.5 \text{ hours} \times 0.86 \text{ WTE} = 32.25 \text{ hours paid per week}$

The same process is followed for different annual leave entitlements, e.g.:

29 days:

Annual leave and general public holidays are subtracted from the above hours to get the total number of actual hours worked per year by a full time person (here calculated from an entitlement of 29 days annual leave per annum):

$$1955.36 - (29 + 8) \times 7.5 \text{ hours} = 1955.36 - 277.5 \\ = 1677.86 \text{ hours per annum actually worked}$$

An annualised hours worker's actual hours are then expressed as a proportion of a full time person's hours in order to obtain the WTE.

Annualised hours workers work:

37.5 hours x 39 weeks = 1462.5 hours per annum worked

The proportion of the annual hours worked by a whole-time worker is therefore:

1462.5 hours worked whole-time / 1677.86 annualised hours worked = 0.87 WTE

Therefore each week the annualised hours workers would receive 37.5 hours x 0.87 WTE = 32.63 hours paid per week

33 days:

Annual leave and general public holidays are subtracted from the above hours to get the total number of actual hours worked per year by a full time person (here calculated from an entitlement of 33 days annual leave per annum):

$1955.36 - (33 + 8) \times 7.5 \text{ hours} = 1955.36 - 307.5$
 $= 1647.86 \text{ hours per annum actually worked}$

An annualised hours worker's actual hours are then expressed as a proportion of a full time person's hours in order to obtain the WTE.

Annualised hours workers work:

37.5 hours x 39 weeks = 1462.5 hours per annum worked

The proportion of the annual hours worked by a whole-time worker is therefore:

1462.5 hours worked whole-time / 1647.86 annualised hours worked = 0.88 WTE

Therefore each week the annualised hours workers would receive 37.5 hours x 0.88 WTE = 33 hours paid per week

Part-time annualised hours workers

If an annualised hours worker works less than whole-time hours (37.5) per week, their entitlement and hours will be calculated pro rata as set out below.

If they work 20 hours per week, their entitlement would be:

20 hours worked / 37.5 hours whole-time = 0.53 WTE

Therefore they would receive the whole-time annualised hours weekly hours (32.25) pro rata i.e. 32.25 whole-time annualised hours x 0.53 WTE worked = 17.09 hours per week

LEAVE ENTITLEMENT FOR COMPRESSED HOURS

Currently if an employee works 75 hours over a 9 day fortnight the formula that is currently in use (since Dec 2006) is as follows:-

$27 \times 7.5 = 202.5 \text{ hours}$ but each day's holiday will be equivalent to 8hrs 20 minutes

Appendix 2 Inclusive Annual Leave Chart (Agenda for Change)

The two tables below outline the amount of hours inclusive annual leave you are entitled to being fully inclusive of the current eight Bank Holidays.

Hours should be rounded up or down to the nearest 0.5 decimal point (i.e. the nearest 1/2 hour).

| Weekly Contracted Hours | 35 Days | | 37 Days | |
|-------------------------|----------------|-----------------------|-----------------------|------------------------|
| | On Appointment | After 5 Years Service | After 5 Years Service | After 10 Years Service |
| 37.5 | 262.5 | 277.5 | 307.5 | |
| 37.0 | 259.0 | 274.0 | 303.5 | |
| 36.5 | 255.5 | 270.0 | 299.5 | |
| 36.0 | 252.0 | 266.5 | 295.0 | |
| 35.5 | 248.5 | 262.5 | 291.0 | |
| 35.0 | 245.0 | 259.0 | 287.0 | |
| 34.5 | 241.5 | 255.5 | 283.0 | |
| 34.0 | 238.0 | 251.5 | 279.0 | |
| 33.5 | 234.5 | 248.0 | 274.5 | |
| 33.0 | 231.0 | 244.0 | 270.5 | |
| 32.5 | 227.5 | 240.5 | 266.5 | |
| 32.0 | 224.0 | 237.0 | 262.5 | |
| 31.5 | 220.5 | 233.0 | 258.5 | |
| 31.0 | 217.0 | 229.5 | 254.0 | |
| 30.5 | 213.5 | 225.5 | 250.0 | |
| 30.0 | 210.0 | 222.0 | 246.0 | |
| 29.5 | 206.5 | 218.5 | 242.0 | |
| 29.0 | 203.0 | 214.5 | 238.0 | |
| 28.5 | 199.5 | 211.0 | 233.5 | |
| 28.0 | 196.0 | 207.0 | 229.5 | |
| 27.5 | 192.5 | 203.5 | 225.5 | |
| 27.0 | 189.0 | 200.0 | 221.5 | |
| 26.5 | 185.5 | 196.0 | 217.5 | |
| 26.0 | 182.0 | 192.5 | 213.0 | |
| 25.5 | 178.5 | 188.5 | 209.0 | |
| 25.0 | 175.0 | 185.0 | 205.0 | |
| 24.5 | 171.5 | 181.5 | 201.0 | |
| 24.0 | 168.0 | 177.5 | 197.0 | |
| 23.5 | 164.5 | 174.0 | 192.5 | |
| 23.0 | 161.0 | 170.0 | 188.5 | |
| 22.5 | 157.5 | 166.5 | 184.5 | |
| 22.0 | 154.0 | 163.0 | 180.5 | |
| 21.5 | 150.5 | 159.0 | 176.5 | |
| 21.0 | 147.0 | 155.5 | 172.0 | |
| 20.5 | 143.5 | 151.5 | 168.0 | |
| 20.0 | 140.0 | 148.0 | 164.0 | |
| 19.5 | 136.5 | 144.5 | 160.0 | |

| Weekly Contracted Hours | 35 Days | | 37 Days | |
|-------------------------|----------------|-----------------------|-----------------------|------------------------|
| | On Appointment | After 5 Years Service | After 5 Years Service | After 10 Years Service |
| 19.0 | 133.0 | 140.5 | 156.0 | |
| 18.5 | 129.5 | 137.0 | 151.5 | |
| 18.0 | 126.0 | 133.0 | 147.5 | |
| 17.5 | 122.5 | 129.5 | 143.5 | |
| 17.0 | 119.0 | 126.0 | 139.5 | |
| 16.5 | 115.5 | 122.0 | 135.5 | |
| 16.0 | 112.0 | 118.5 | 131.0 | |
| 15.5 | 108.5 | 114.5 | 127.0 | |
| 15.0 | 105.0 | 111.0 | 123.0 | |
| 14.5 | 101.5 | 107.5 | 119.0 | |
| 14.0 | 98.0 | 103.5 | 115.0 | |
| 13.5 | 94.5 | 100.0 | 110.5 | |
| 13.0 | 91.0 | 96.0 | 106.5 | |
| 12.5 | 87.5 | 92.5 | 102.5 | |
| 12.0 | 84.0 | 89.0 | 98.5 | |
| 11.5 | 80.5 | 85.0 | 94.5 | |
| 11.0 | 77.0 | 81.5 | 90.0 | |
| 10.5 | 73.5 | 77.5 | 86.0 | |
| 10.0 | 70.0 | 74.0 | 82.0 | |
| 9.5 | 66.5 | 70.5 | 78.0 | |
| 9.0 | 63.0 | 66.5 | 74.0 | |
| 8.5 | 59.5 | 63.0 | 69.5 | |
| 8.0 | 56.0 | 59.0 | 65.5 | |
| 7.5 | 52.5 | 55.5 | 61.5 | |
| 7.0 | 49.0 | 52.0 | 57.5 | |
| 6.5 | 45.5 | 48.0 | 53.5 | |
| 6.0 | 42.0 | 44.5 | 49.0 | |
| 5.5 | 38.5 | 40.5 | 45.0 | |
| 5.0 | 35.0 | 37.0 | 41.0 | |
| 4.5 | 31.5 | 33.5 | 37.0 | |
| 4.0 | 28.0 | 29.5 | 33.0 | |
| 3.5 | 24.5 | 26.0 | 28.5 | |
| 3.0 | 21.0 | 22.0 | 24.5 | |
| 2.5 | 17.5 | 18.5 | 20.5 | |
| 2.0 | 14.0 | 15.0 | 16.5 | |
| 1.5 | 10.5 | 11.0 | 12.5 | |
| 1.0 | 7 | 7.4 | 8.2 | |

Appendix 3 Inclusive Annual Leave Calculator

An electronic version of this will be available on the intranet / web site / share point

| Annual Leave Calculator - Agenda for Change ONLY | | Instructions | | | | | |
|--|--|--|--|------------|---|------|--|
| Required Information | <table border="1"> <tr> <td>1. Insert Total Annual Leave (if Full Time)</td> <td>2. Insert Number of Hours worked per week</td> </tr> <tr> <td>27 (BC)</td> <td>24 (BC)</td> </tr> </table> | 1. Insert Total Annual Leave (if Full Time) | 2. Insert Number of Hours worked per week | 27 (BC) | 24 (BC) | 7 | <p>This calculator is designed to show your annual leave entitlement in hours under Agenda for Change terms & conditions.</p> <p>Please note that the entitlement shown will be inclusive of bank holiday entitlement regardless of whether you work full-time or part-time.</p> <p>To use this calculator simply fill in the Blue Cells (BC) with the required information</p> <p>1. Annual Leave is dependant upon length of service in the NHS:</p> <p>Length of NHS service 0 - 5 years = 27 Days (if full time) 5-10 years = 29 Days (if full time) 10+ years = 33 Days (if full time)</p> <p>2. Total number of hours worked per week</p> |
| 1. Insert Total Annual Leave (if Full Time) | 2. Insert Number of Hours worked per week | | | | | | |
| 27 (BC) | 24 (BC) | | | | | | |
| Full Years Calculation | <table border="1"> <tr> <td>Annual Leave Entitlement in Hours</td> </tr> <tr> <td>168.0 (OC)</td> </tr> </table> | Annual Leave Entitlement in Hours | 168.0 (OC) | 168.00 | <p>Full Years Calculation</p> <p>The Annual Leave entitlement inclusive of Bank Holiday entitlement (for a full leave year 1st April - 31st March) will then be calculated and produced in the Orange Cells (OC).</p> | | |
| Annual Leave Entitlement in Hours | | | | | | | |
| 168.0 (OC) | | | | | | | |
| Part Year Calculation | <table border="1"> <tr> <td>Insert No. of complete days worked in Financial Year</td> <td>Pro-rata Annual Leave Entitlement in Hours</td> </tr> <tr> <td>182.5 (BC)</td> <td>84.0 (OC)</td> </tr> </table> | Insert No. of complete days worked in Financial Year | Pro-rata Annual Leave Entitlement in Hours | 182.5 (BC) | 84.0 (OC) | 38.4 | <p>Part Year Calculation</p> <p>When calculating annual leave entitlement for staff who have started part way through the year please use the bottom part of the worksheet. Input the complete number of days that the employee will work during the current financial year and the pro-rata entitlement will be produced in the Orange Cells (OC) to the right. This can also be used for staff who change their hours part way through the year.</p> |
| Insert No. of complete days worked in Financial Year | Pro-rata Annual Leave Entitlement in Hours | | | | | | |
| 182.5 (BC) | 84.0 (OC) | | | | | | |
| | | 84.0 | | | | | |

Appendix 4 Monitoring

| Minimum requirement to be monitored | Process for monitoring e.g. audit | Responsible individuals/ group/ committee | Frequency of monitoring/audit | Responsible individuals/ group/ committee (multidisciplinary) for review of results | Responsible individuals/ group/ committee for development of action plan | Responsible individuals/ group/ committee for monitoring of action plan |
|--|--|---|-------------------------------|---|--|---|
| Line manager to authorise and monitor using annual leave card. May also use other method such as a spreadsheet | Line manager's checking process including rotas where necessary to ensure adequate staff cover | Line Manager | Day to day as required | N/A | N/A | N/A |

Appendix 5 Equality Analysis

Equality Analysis

Introduction

The general equality duty that is set out in the Equality Act 2010 requires public authorities, in the exercise of their functions, to have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.

The general equality duty does not specify how public authorities should analyse the effect of their existing and new policies and practices on equality, but doing so is an important part of complying with the general equality duty. It is up to each organisation to choose the most effective approach for them. This standard template is designed to help LCHS staff members to comply with the general duty.

Please complete the template by following the instructions in each box. Should you have any queries or suggestions on this template, please contact Rachel Higgins Equality and Human Rights Lead.

Name of Policy/Procedure/Function*

Inclusive Annual Leave

Equality Analysis Carried out by: Sophie Coutts

Date: 26.01.17

Equality & Human rights Lead: Rachel Higgins

Director: Maz Fosh

***In this template the term policy\service is used as shorthand for what needs to be analysed. Policy\Service needs to be understood broadly to embrace the full range of policies, practices, activities and decisions: essentially everything we do, whether it is formally written down or whether it is informal custom and practice. This includes existing policies and any new policies under development.**

Section 1 – to be completed for all policies

| | | | | |
|---|--|---|----|--|
| A. | Briefly give an outline of the key objectives of the policy; what it's intended outcome is and who the intended beneficiaries are expected to be | Annual leave will be inclusive and pro rata of 8 bank holidays and will be accrued and taken in line with this policy so as to ensure that all staff whether part time or full time, flexible or non-flexible have consistent and equal entitlements. | | |
| B. | Does the policy have an impact on patients, carers or staff, or the wider community that we have links with? Please give details | The policy is intended for staff. | | |
| C. | Is there is any evidence that the policy\service relates to an area with known inequalities? Please give details | No, the policy has been written to be inclusive of bank holidays so that it treats part-time workers fairly. | | |
| D. | Will/Does the implementation of the policy\service result in different impacts for protected characteristics? | | | |
| | | Yes | No | |
| | Disability | | X | |
| | Sexual Orientation | | X | |
| | Sex | | X | |
| | Gender Reassignment | | X | |
| | Race | | X | |
| | Marriage/Civil Partnership | | X | |
| | Maternity/Pregnancy | | X | |
| | Age | | X | |
| | Religion or Belief | | X | |
| | Carers | | X | |
| If you have answered 'Yes' to any of the questions then you are required to carry out a full Equality Analysis which should be approved by the Equality and Human Rights Lead – please go to section 2 | | | | |
| The above named policy has been considered and does not require a full equality analysis | | | | |
| Equality Analysis Carried out by: | | Sophie Coutts | | |
| Date: | | 26.01.17 | | |