

**Leave Management  
(Annual Leave)  
(Long Service Leave)**

**Conversation Guide for Supervisors**

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## 1 Introduction

This guide provides information for nominated supervisors in the effective management, discussion and planning of staff member's annual and long service leave.

The *ACU Staff Enterprise Agreement 2017 – 2021* (The Agreement), the Recreational Leave Policy and the Long Service Leave Policy outline the arrangements for the accrual and management of annual leave and long service leave for the staff member and the supervisor.

The guide is composed of four (4) parts:

- Part 1 provides background and general information on the benefits of leave management, the responsibilities of Staff and Supervisor, the normal application of leave, potential barriers to taking leave, ways to encourage staff to utilise leave, ways of taking leave, cashing out of annual and long service leave, managing excess leave and managing difficult conversations with staff.
- Part 2 provides a simple four (4) step approach to Annual Leave and Long Service Management, resources, reference material and Template letters.
- Part 3 provides information on the content of each Template Letter, who provides the letter to the staff member, when it is provided, purpose, resources and reference material.
- Part 4 has each of the Template Letters to be used.

## PART 1

### 2 Benefits

The benefits of the effective management, planning and application of leave include:

- Staff need to take periods of leave or use leave regularly for their wellbeing, work-life balance and connection with family and friends;
- Maintaining staff health and wellbeing, which is critical to a productive working and learning environment. Not taking leave may expose staff to an increased risk of burnout and stress-related illnesses, potentially increasing use of sick leave;
- Taking leave regularly may provide other staff with an opportunity to act in a position of higher duties or with different responsibilities, thereby increasing skills and enabling career development opportunities;
- Avoiding the possibility of staff who have accrued large amounts of leave taking a large block of leave to reduce their leave balance. This may have a negative impact on provision of services without adequate planning for coverage; and
- Organisational leave liabilities need to be managed at sustainable levels so as not to impact on funds in reserve required for other organisational requirements.

### 3 Responsibilities

Staff members and supervisors both have responsibilities to manage leave. Conversations about the planning and taking of leave are encouraged throughout the year, particularly during progress plan discussions.

Staff are responsible for:

- Making plans to take their annual or long service leave regularly and discussing this with their supervisor, which includes providing appropriate notice for leave requests,
- Requesting leave via Staff Connect, and
- Working with their supervisor to develop a leave management plan to reduce excessive leave balances.

Supervisors are responsible for:

- The day-to-day management of annual and long service leave
- Ensuring that staff do not accrue large leave balances and are actively encouraged to take leave
- Regularly reviewing staff leave balances and ensuring that accrued leave is taken
- Identifying the most appropriate times for leave to be taken in the work area
- Working with staff to reduce their leave balances within a reasonable timeframe
- Understanding the Agreement and policy provisions which inform the accrual, taking and management of annual leave and long service leave
- Understanding their accountability in effectively managing leave and associated financial implications.

## 4 Application of Annual and Long Service Leave

Staff members start accruing leave from the day they commence at ACU. The Agreement outlines the accrual per year for annual and long service leave and any conditions of access to long service leave entitlements. Information is available to staff on Staff Connect. Information is also available to Members of the Executive through the Human Resources Monthly Leave Report available on request.

A conversation about leave planning or leave taking can occur at any time. Managing the expectations of staff on planning and taking leave should commence between the nominated supervisor and staff member at the time of induction, and for new academic staff as a part of their annual workload allocation at the time of commencement.

The progress plan discussion between staff member and nominated supervisor is a good time to discuss leave planning. The Human Resources Monthly Leave Report enables Members of the Executive to review the accrual, taken and booked leave of all their staff and initiate a discussion where appropriate between staff member and supervisor.

For academic staff the planning and taking of four (4) weeks annual leave per year or the equivalent pro-rata amount is a component of their workload allocation. This means that for a full time academic staff member 1595 workload hours are allocated on the basis that 140 hours of annual leave is taken each year, otherwise additional workload can be allocated.

Following a conversation about leave planning the staff member should apply for the agreed leave on Staff Connect. This will enable the updating of leave records in the next Monthly Leave Report.

When leave is effectively planned and regularly utilised by a staff member in a discussion with and the approval of their nominated supervisor, the management of leave is normally straightforward. However, there are situations where this may not be the case where a staff member:

- is reluctant to take either their annual leave and/or long service leave
- has accrued annual leave in excess of forty (40) days
- has accrued long service leave in excess of sixteen (16) weeks (professional staff) or 4.5 months (academic staff)
- has accrued both annual leave in excess of forty (40) days and long service leave in excess of sixteen (16) weeks or 4.5 months (as relevant).

Under the Agreement the University and nominated supervisors have the ability to reasonably direct staff to take leave with appropriate notice under certain conditions. Ideally, in the first instance the nominated

supervisor should meet with the affected staff member to discuss planning their leave and to understand any potential barriers (if any) impeding the staff member to take leave, and to consider options and ways to enable leave to be taken. Examples of potential barriers that staff may raise are provided in the table below.

| Potential Barriers  |  |   |
|---|--|---|
| Workplace   | Personal   | Other   |
| <ul style="list-style-type: none"> <li>• Workload before and after leave</li> <li>• Perceived lack of resources for cover</li> <li>• Perception no one else can do the job properly or capable of doing the job</li> <li>• Difficulty of scheduling leave when desired or around key projects</li> <li>• Job security</li> <li>• Perceived work unit culture</li> <li>• Perceived management support</li> </ul> | <ul style="list-style-type: none"> <li>• Love their job and will take leave sometime</li> <li>• Availability of funds and affordability</li> <li>• Fitting around partner's availability</li> <li>• Deliberate accrual for emergencies</li> <li>• Saving leave for the big trip</li> <li>• Family commitments</li> <li>• Not a priority at the moment</li> <li>• Time taken to plan a holiday</li> </ul> | <ul style="list-style-type: none"> <li>• Fear of change, things happen when they are away</li> <li>• Don't want to 'rock the boat'</li> <li>• Desire to demonstrate value and organisational commitment</li> <li>• Increased workloads</li> <li>• Perceived impact on promotion opportunity</li> <li>• Perceived impact on completion of research</li> <li>• Leave seen as 'Insurance Policy'</li> <li>• Retirement 'Nest Egg'</li> </ul> |

## 5 Ways to Encourage Staff to Utilise Leave

It is important to be cautious and consider individual circumstances, workplace or personal; Remember staff will have different perceived barriers to taking leave. It is not a 'one size fits all' approach and each conversation can have different outcomes.

As a supervisor or manager of staff you will need to consider:

- Emphasising the importance of taking leave to focus on family, friends or rejuvenation and not only for travel and holidays
- Demonstrating clear management support for leave taking, and that supervisors and managers model desired behaviour by actively taking leave as well
- Taking a supportive approach, working with staff to assist planning and address their concerns regarding workplace, personal or other barriers
- Providing adequate cover of a staff member's work during leave periods thereby reducing possible anxiety they have in taking leave or returning from leave
- Working with the staff member to document tasks or work to be performed pre-leave and allocate to other staff to perform specific duties and share the load
- Effective email management during leave periods, examples are:
  - reduce email build up while staff are on leave by ensuring someone is reviewing emails, or
  - effectively use the 'Out of Office Message' function to redirect queries to an alternative contact person
- For professional staff roles dependent on the period of leave, consider if this could provide a development opportunity for other professional staff through higher duties
- Plan for staff taking annual leave – when setting work objectives for the year ahead or creating a new position, plan workload allocation on the basis of 48 weeks not 52 weeks.
- Consider what the optimal and non-optimal times for taking leave are in order to plan a staff member's leave or more than one staff member's leave, for example:
  - To ensure services are not impacted to staff, students and relevant stakeholders

- It may only be possible for staff, such as academic or academic support staff, to take leave during the non-teaching weeks
- Engage with staff about the importance of and potential timeframes for taking leave – the performance review and planning process is an ideal time to discuss planned leave and factor into the year ahead

## 5.1 Ways of taking annual leave and long service leave

The following are examples of how leave can be taken in various ways, other than as a block, and you may think of other ways which enable staff to utilise their leave based on individual circumstance.

Encourage staff to take a combination of holidays and short bursts/periods of leave to reduce workplace, personal or other barriers:

- One or two days regularly taken either side of a weekend and long weekend can constitute a refreshing break
- One day's leave taken every two weeks for six months may be less challenging to a staff member than asking them to take a three week break whilst achieving the same benefits for all parties. Dependent on leave accrued this could be extended longer than six months
- A combination of the above
- Consider variations that may work for the staff member given their individual circumstance(s)

A combination of holidays and short breaks minimises personal barriers to taking leave and if taken frequently they encourage employees to spend leave 'enjoying' rather than 'recovering'.

## 5.2 Cashing out of Annual Leave and Long Service leave

The University does genuinely encourage and expect all staff, supervisors and managers included, to fully utilise their annual leave and long service leave. Whilst it is preferable that staff plan and take leave, staff can request the 'Cashing Out' of portions of their annual leave and long service leave balance under certain conditions.

## 6 Management of Excess Leave

Once you have established that a staff member has accrued excess leave, you will need to actively manage the situation to ensure leave balances are reduced to an acceptable level.

Arrange to meet with the staff member to discuss their accrued leave and how they will reduce it. This may require more than one conversation in order to consider if there are any barriers to the staff member taking leave, discussing options, and confirming a way forward. The initial meeting is an opportunity for you to:

- ask the staff member if there is a reason they have been unable to take leave
- consider any actions you may need to take to enable the staff member to take leave
- advise the staff member you would like them to take some of their leave and work together on a leave plan
- agree on a time frame for the staff member to consider their options and respond to you and advise on their leave plans
- organise a time for another meeting if required

Refer to Table 1 (page 8) for details on the four (4) step process for excess leave management.

## 7 Managing Difficult Conversations with Staff

Having a conversation with a staff member regarding management of excess leave may be difficult if there is resistance or reluctance. Consider the following advice to assist you in having this conversation:

- Prepare beforehand/seek advice from Human Resources
- Consider the potential barriers to taking leave previously described as you may well be familiar with the staff member's approach to work and leave, and which allows you to pre-prepare to address concerns they may have
- Familiarise yourself with the ACU Staff Enterprise Agreement and relevant leave policies
- Listen to the staff member and explore their reasons for accumulating leave
- Acknowledge the reasons but be clear about the University's expectations of taking leave
- Educate the staff member regarding the ACU Staff Enterprise Agreement and relevant policy
- Discuss the benefits of taking leave (rest/recreation, own wellbeing, family/friends) with the staff member
- Advise that the University may provide notice to take leave however the preferred option would be to work together to come up with a leave plan
- Explore options and work together to come up with best solution

## PART 2

**8 Table 1. Four Steps to Annual Leave and Long Leave Service Management**

| Steps   | Who                  | When  | Purpose and Actions   | Resources and reference material  |
|---|----------------------|---|---|---|
| <b>Step 1</b><br>Planning and Preparation for both the normal yearly accrual and/or any excess annual or long service leave | Nominated Supervisor | Starts with induction for new staff. Following commencement a conversation on leave can occur at any time. A Human Resources Monthly Leave Report is available to Executive members on request. | <p>Annual leave and Long Service Leave is planned for the year ahead and actively encouraged.</p> <p>Under 3.11.3.2 of the Agreement an academic staff member and their supervisor are required to make provision for the staff member to take annual leave when consulting about the staff member's academic workload allocation for the following year.</p> <p>Under 4.8.3 (iii) of the Agreement the Performance and Review Process (Progress Plan) is an opportunity to discuss the staff member's plans for taking annual, long service and other leave. However, if a Progress Plan discussion has not occurred, a conversation can occur at any time to plan the taking of leave and/or where a staff member is identified with excess leave the preparation of a relevant letter to commence the leave planning conversation.</p> | <ul style="list-style-type: none"> <li>• ACU Staff Enterprise Agreement 2017-2021 Sections 3.8 Long Service Leave<sup>1</sup> and 3.11 Recreation Leave</li> <li>• Recreational Leave Policy</li> <li>• Long Service Leave Policy</li> <li>• ACU Staff Enterprise Agreement 2017 - 2021 Section 4.8 Performance - Review and Planning</li> <li>• Human Resources Monthly Leave Report</li> <li>• Academic Workload Policy</li> <li>• Academic Workload Planning System</li> <li>• Consultation/Conversation Guide for Staff who may be underload</li> </ul> |

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<sup>1</sup> Noting that there is also an adjustment to rules for directing staff to take long service leave where they have significant accruals. This issue has been identified in enterprise bargaining and will apply in advance of a new agreement. In summary, professional staff with long service leave balances of more than 16 weeks can be directed to take leave with 2 years' written notice, and academic staff with long service leave balances of more than 4.5 months can be directed to take leave with 12 months' written notice. The amended agreement provision is attached as Appendix A.

| Steps   | Who  | When  | Purpose and Actions   | Resources and reference material  |
|---|--|---|---|---|
| <b>Step 2</b><br>Initial communication with the staff member dependent on the leave balance situation | Nominated Supervisor and/or relevant Member of Executive | Prompted either by the nominated supervisor reviewing staff leave balances on Staff Connect, the Human Resources Monthly Leave Report, or the Progress Plan conversation. | Nominated supervisor and/or relevant Member of the Executive send relevant template letter to commence the leave conversation.<br><br>The nominated supervisor prepares to meet with staff member to discuss the staff members leave situation.   | <ul style="list-style-type: none"> <li>• Communication Templates A, B, C, G and/or I (refer Part 3, Table 2 for more information)</li> <li>• Leave Management Conversation Guide</li> </ul> |
| <b>Step 3</b><br>Meet with the staff member to discuss the management and planning of leave           | Nominated Supervisor and Staff member                    | Following the written advice to the staff member as identified in Step 2 above.   | Arrange to meet with the staff member to: <ul style="list-style-type: none"> <li>• Clarify the staff member's leave balances, and discuss the benefits of taking leave</li> <li>• Discuss any barriers the staff member has identified that they believe are preventing them from taking leave and address their concerns</li> <li>• Explore ways to reduce excess leave balances (where applicable)</li> <li>• Work with the staff member to make a leave management plan</li> <li>• For an academic staff member who has not confirmed or fully booked their 20 days leave for the year, discuss their intention to take annual leave or discuss adjusting their workload allocation accordingly where applicable.</li> <li>• When a leave plan is agreed ensure the staff member books the leave on Staff Connect in order that the next Monthly Leave Report is updated and if an Academic staff member this automatically appears in the Academic Workload Planning System.</li> </ul> | <ul style="list-style-type: none"> <li>• Leave Management Conversation Guide</li> </ul>   |

| Steps  | Who                                   | When   | Purpose and Actions   | Resources and reference material  |
|--|---------------------------------------|--|---|---|
| <b>Step 4</b><br>Action is taken in line with University policies and the Staff Enterprise Agreement where the staff member's excess leave balances are not reduced. | Nominated Supervisor and Staff member | Leave management plan was not finalised and/or leave requests have not been submitted as agreed at least two months after the initial letter in Step 2 was sent. | Letters are sent to staff members via email from the relevant Member of the Executive directing the staff member to take annual and/or long service leave on specific dates with appropriate notice. Staff members are instructed to discuss any concerns regarding this direction to take leave with their nominated supervisor. | <ul style="list-style-type: none"> <li>• Leave Management Conversation Guide</li> <li>• Communication Templates D and H (Refer Part 3, Table 2 for more information)</li> </ul> |

## PART 3

### 9 Table 2. Template Letters

Download these Word Document templates from the [Leave Management](#) page.

| Template  | Who                  | When  | Purpose and Actions  | Resources and reference material  |
|---|----------------------|---|--|---|
| <b>Template A</b><br>Academic staff member has 20 days Annual Leave or less not taken or booked for calendar year | Nominated Supervisor | Academic Staff member has not taken or booked 20 days annual leave and may be under load as a result                                      | Email letter reminds the academic staff member that Annual Leave is a component part of the annual workload allocation.<br>For a full time academic staff member 1595 workload hours are allocated on the basis of that 140 hours of annual leave is taken each year, otherwise additional workload can be allocated.  | <ul style="list-style-type: none"> <li>Academic Workload Policy</li> <li>Academic Workload Planning System</li> <li>Consultation/Conversation Guide for Staff who may be underload</li> </ul> |
| <b>Template B</b><br>Staff Member has accrued annual leave of 30 days and will have 40 days within 6 months       | Nominated Supervisor | Staff member has been identified that they will reach 40 days annual leave within the next 6 months and has not submitted a leave request | Email letter advises a staff member who has accrued annual leave of 30 days that they will have 40 days within 6 months. This is a letter to proactively inform the staff member before they reach the 40 day accrual, whereby the University can then formally direct a staff member to take leave, to meet with their nominated supervisor to discuss ways of reducing excess leave.<br><br>For Academic staff the letter needs to be considered in the context and impact on workload allocation in any given year. | <ul style="list-style-type: none"> <li>Leave Management Conversation Guide</li> <li>ACU Staff Enterprise Agreement Section 3.11</li> <li>Recreational Leave Policy</li> </ul>                 |

| Template   | Who   | When  | Purpose and Actions   | Resources and reference material  |
|--|---|---|---|---|
| <p><b>Template C</b><br/> <b>Annual Leave</b><br/>           greater than 40 days (Letter 1)</p> | <p>Relevant Member of the Executive with email cc to Nominated Supervisor</p> | <p>Staff Member has accrued 40 days annual leave and nominated supervisor has not received advice from the staff member of a leave plan</p> | <p>The University can direct staff with an annual leave balance in excess of 40 days to take leave. In conjunction with the ACU Staff Enterprise Agreement 2017 - 2021, and the Recreational Leave Policy the University can direct a staff member to take a period of ten days annual leave by a specified date. For the purposes of the specified date the University is using 2 months.</p> <p>This letter notifies a staff member to reduce their annual leave balance by 10 days within 2 months of the date of the letter of notice, in discussion with their nominated supervisor.</p> <p>The requirement to take 10 days annual leave within 2 months can be negated if in discussion with their nominated supervisor:</p> <ul style="list-style-type: none"> <li>• the staff member agrees on a time to take annual leave to reduce their balance below 30 days within 6 months of the date of the letter and applies for this leave on Staff Connect; or</li> <li>• the nominated supervisor approves (consistent with the delegations) continued accrual of leave above 40 days on the condition that an application is made by the staff member to take and reduce their annual leave balance below 20 days within 1 year from the date of the notice letter, and applies for this leave via Staff Connect.</li> <li>• <b>Considerations:</b> a staff member with a large annual leave balance will always be in a position of direction to take 10 days annual leave within two months as the leave would never be reduced to an acceptable balance. The discussion will need to be around the reduction of annual leave to either below 30 days within six months or below 20 days in one year, or if the staff member has a significant annual leave balance may need to be over an 18 month period, taking into account further accrual of annual leave.</li> </ul> | <ul style="list-style-type: none"> <li>• ACU Staff Enterprise Agreement Section 3.11.5.1 and 3.11.5.2</li> <li>• Recreational Leave Policy</li> </ul> |

| Template  | Who  | When   | Purpose and Actions  | Resources and reference material  |
|---|--|--|--|---|
| <b>Template D Annual Leave</b> greater than 40 days and staff member has not provided a leave plan or discussed with their nominated supervisor following receipt of Letter 1 (above) | Relevant Member of the Executive with email cc to Nominated Supervisor | Minimum 2 months after Letter 1                      | <p>The letter specifically directs a staff member to take leave at a certain time and for a certain period. This letter is provided at minimum 2 months from the time of the original notice to take annual leave (Letter 1 above – Template C) where the staff member has no agreed plan, nor advised or discussed with their Nominated Supervisor to take sufficient annual leave to reduce their balance and applied for the leave on Staff Connect.</p> <p>In the absence of any exceptional circumstances the University may direct the staff member to take sufficient annual leave to bring their entitlement below 30 days and may direct the dates on which such leave will be taken. In doing so the University must give at least two months' notice.</p> | <ul style="list-style-type: none"> <li>ACU Staff Enterprise Agreement Section 3.11.5.3</li> <li>Recreational Leave Policy</li> </ul>                    |
| <b>Template E Long Service Leave Eligibility</b>  | Human Resources with email cc to Nominated Supervisor                  | When staff member is eligible for long service leave | The letter specifically advises the staff member they are now eligible to utilise long service leave, the terms and conditions and the options available.  | <ul style="list-style-type: none"> <li>ACU Staff Enterprise Agreement 2017 – 2021 Section 3.8<sup>2</sup></li> <li>Long Service Leave Policy</li> </ul> |
| <b>Template F Long Service Leave</b> in excess of 9 weeks option to cash out long service leave letter  | Human Resources with email cc to Nominated Supervisor                  | Twice per year (July and January)                    | <p>The letter specifically advises the staff member that they can cash out a portion of their long service leave under certain conditions:</p> <ul style="list-style-type: none"> <li>cash out an amount of a staff members long service leave provided they retain a minimum balance of nine (9) weeks, or</li> <li>take a period of long service leave and simultaneously cash out an amount of long service leave equivalent to the period of leave taken.</li> </ul>   | <ul style="list-style-type: none"> <li>ACU Staff Enterprise Agreement 2017 – 2021 Section 3.8.4</li> <li>Long Service Leave Policy</li> </ul>           |

<sup>2</sup> Noting that there is also an adjustment to rules for directing staff to take long service leave where they have significant accruals. This issue has been identified in enterprise bargaining and will apply in advance of a new agreement. In summary, professional staff with long service leave balances of more than 16 weeks can be directed to take leave with 2 years' written notice, and academic staff with long service leave balances of more than 4.5 months can be directed to take leave with 12 months' written notice. The amended agreement provision is attached as Appendix A.

| Template  | Who  | When             | Purpose and Actions  | Resources and reference material  |
|---|--|------------------|--|---|
| <b>Template G</b><br><b>Long Service Leave</b> in excess of 16 weeks (LSL Letter 1)                               | Relevant Member of the Executive with email cc to Nominated Supervisor | Once per quarter | <p>The letter specifically advises a staff member that they have a long service leave balance in excess of 16 weeks (professional staff) or 4.5 months (academic staff) and to meet with their nominated supervisor to discuss a plan to reduce their balance by a minimum of 6 weeks (and up to 12 weeks for professional staff) with notice of 2 years for professional staff and 12 months for academic staff. Includes the option to cash out a portion of long service leave.</p> <p>This is the first point where the University can commence the direction to take long service leave to the staff member. Therefore, the letter provides the advice that if long service leave is not sufficiently reduced, the University can direct the staff member to take long service leave at a time convenient to the University with the required notice.</p> | <ul style="list-style-type: none"> <li>ACU Staff Enterprise Agreement 2017-2021 Section 3.8.3.4<sup>3</sup></li> <li>Long Service Leave Policy</li> </ul> |
| <b>Template H</b><br><b>Long Service Leave</b> in excess of 16 weeks and not reduced as described in LSL Letter 1 | Relevant Member of the Executive with email cc to Nominated Supervisor | Once per quarter | Where a staff member has taken no action or not had a discussion to plan the taking of long service as described in Template G – LSL Letter 1, the University can direct the staff member to take a period of long service leave of a minimum of 6 weeks (for professional staff, to a maximum of 12 weeks with the required notice of the date of commencement of the leave.  | <ul style="list-style-type: none"> <li>ACU Staff Enterprise Agreement 2017-2021 Section 3.8.3.4<sup>3</sup></li> <li>Long Service Leave Policy</li> </ul> |

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<sup>3</sup> Noting that there is also an adjustment to rules for directing staff to take long service leave where they have significant accruals. This issue has been identified in enterprise bargaining and will apply in advance of a new agreement. In summary, professional staff with long service leave balances of more than 16 weeks can be directed to take leave with 2 years' written notice, and academic staff with long service leave balances of more than 4.5 months can be directed to take leave with 12 months' written notice. The amended agreement provision is attached as Appendix A.

| Template   | Who  | When             | Purpose and Actions  | Resources and reference material  |
|--|--|------------------|--|---|
| <b>Template 1</b><br>Both <b>Annual Leave</b> balance in excess of 40 days and <b>Long Service Leave</b> balance in excess of 16 weeks | Relevant Member of the Executive with email cc to Nominated Supervisor | Once per quarter | <p>The letter specifically recognises that with large balances of both annual and long service leave a comprehensive leave plan of up to two years needs to be discussed. In the first instance the leave plan should include the reduction of annual leave to below thirty days as a priority. In addition, there are options of cashing out portions of both annual and long service leave.</p> <p>In any case the University can direct a staff member to take both annual leave and long service leave at certain dates and for a certain period as specified under the Agreement.</p> | <ul style="list-style-type: none"> <li>ACU Staff Enterprise Agreement 2017-2021 Section 3.8<sup>4</sup> Long Service leave and 3.11 Recreation Leave</li> <li>Long Service Leave Policy</li> <li>Recreational Leave Policy</li> </ul> |

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<sup>4</sup> Noting that there is also an adjustment to rules for directing staff to take long service leave where they have significant accruals. This issue has been identified in enterprise bargaining and will apply in advance of a new agreement. In summary, professional staff with long service leave balances of more than 16 weeks can be directed to take leave with 2 years' written notice, and academic staff with long service leave balances of more than 4.5 months can be directed to take leave with 12 months' written notice. The amended agreement provision is attached as Appendix A.

## PART 4

### **10 Annual Leave Template Letters (A to D)**

#### **TEMPLATE A**

**Advice to Academic staff member with less than 20 days Annual Leave taken or booked in a calendar year**

**Sent to the Academic staff member via email by the Nominated Supervisor**

Dear <Insert Name>,

I am writing to you to advise as at the date of this letter you have not yet fully taken or booked twenty (20) days annual leave or the relevant pro-rata full time equivalent amount for the year <insert year>.

As you would be aware, annual leave for academic staff is a component part of your annual workload that is for a full time academic staff member the annual workload consists of 1595 workload hours and 140 hours of annual leave. It is the expectation that annual leave is taken each year and where this does not occur the equivalent untaken annual leave hours are available for additional workload to be allocated.

Whilst the University appreciates the dedication shown by its staff, it is important to plan for regular periods of leave and enable time off for relaxation and recreation. Utilising annual leave regularly enables a healthy work/life balance whilst maintaining connection with both family and friends. Regular leave taking also fosters a productive working and learning environment.

As a result could you please advise me within the next two weeks from the date of this letter of your leave plans for the remainder of <insert year>, and submit an application to take annual leave via Staff Connect. In the absence of your response, I will need to consider an appropriate additional workload allocation.

If you wish to discuss the application of your annual leave and associated workload please contact me.

Kind Regards

*Nominated Supervisor*

## TEMPLATE B

### **Pro-active advice to staff with greater than 30 days and less than 40 days Annual Leave Notice to plan sent to staff member via email from the Nominated Supervisor**

Staff who have reached thirty (30) days annual leave will be provided notice to plan. The Organisational Unit can proactively communicate with staff and establish annual leave plans to effectively manage and encourage the taking of annual leave for the next twelve (12) to eighteen (18) months.

Dear <Insert Name>,

You may not be aware that your accrued annual leave balance is more than thirty (30) days and within the next six (6) months will approach forty (40) days.

Whilst the University is appreciative of the dedication shown by its staff, it is important to plan for regular periods of leave and enable time off for relaxation and recreation. Utilising annual leave regularly enables a healthy work/life balance whilst maintaining connection with both family and friends. It also fosters a productive working and learning environment.

Could you please arrange a time for us to discuss your plans for taking annual leave over the next twelve (12) months in order to enable you to utilise your annual leave entitlement.

Yours sincerely

*Nominated Supervisor*

## TEMPLATE C

### **Annual Leave in excess of 40 days (first Notice)**

#### **Email to staff member from the relevant Member of the Executive with copy to Nominated Supervisor**

*Staff who are in excess of forty (40) days annual leave will receive notice to take ten (10) days immediately, that is, within the next two (2) months.*

Dear <Insert Name>,

You may not be aware that your accrued annual leave balance is in excess of forty (40) days.

Whilst the University appreciates the dedication shown by its staff, it is important that the University encourages staff to plan for regular periods of leave and enable time off for relaxation and recreation. Utilising annual leave regularly enables a healthy work/life balance whilst maintaining connection with both family and friends. Regular leave taking also fosters a productive working and learning environment.

The University's Staff Enterprise Agreement details the entitlement and processes to manage annual leave. This letter is notice to advise that, within two (2) months of the date of this letter, you will need to apply through Staff Connect to take ten (10) days annual leave in order to reduce your annual leave balance.

Prior to applying for annual leave please arrange a time to meet with your nominated supervisor to discuss a suitable time to take the required annual leave. During this meeting, you may wish to discuss the following other options:

1. An agreed time to take annual leave to reduce your balance to below thirty (30) days within six (6) months of the date of this letter; or
2. An agreed time to take and reduce your annual leave below twenty (20) days within one (1) year from the date of this letter.

In either option, the application for leave must be submitted via Staff Connect within two (2) months from the date of this letter.

There will be ongoing discussion on utilising and taking annual leave as part of progress plan discussions with your nominated supervisor as the University genuinely encourages staff to take their leave entitlement each year. For Academic staff in particular, the taking of annual leave forms an essential part of the discussion on the annual workload allocation. Where the full four (4) weeks annual leave is not taken or planned, the untaken leave should increase the Academic staff member's availability for additional academic work.

You need to be aware that if no application is submitted through Staff Connect for a period of annual leave as described in this letter, the University can direct you to take sufficient annual leave to bring your accrued entitlement below thirty (30) days and may direct the dates on which such leave will be taken with two (2) months written notice.

Please speak to your nominated supervisor in the first instance to commence the discussion on the planning and taking of your leave.

Yours sincerely

*Member of Executive*

cc: *Nominated Supervisor*  
*Human Resources*

## TEMPLATE D

### **Annual Leave remains in excess of 40 days (Second Notice with Direction)**

#### **Email to staff member from the relevant Member of the Executive with copy to Nominated Supervisor**

Where no action to reduce the Annual Leave balance has taken place based within two months of the receipt of the Template C letter (above) the staff member will receive a follow up directive to take sufficient Annual Leave to bring entitlement to below (30) days.

Dear <Insert Name>,

I am writing to you as your annual leave balance remains in excess of forty (40) days within two (2) months of the original notice provided to you. If you have been in discussion with your nominated supervisor and have agreed to take action to reduce your annual leave balance, this has not yet been applied for via Staff Connect and approved.

Consequently, the University now provides notice that you are required to take annual leave consistent with clause 3.11.5.3 of the *ACU Staff Enterprise Agreement 2017-2021*. In discussion with your nominated supervisor the following annual leave arrangements will apply.

You are required to take <#days/hours> annual leave, from <insert start date of leave must be at least 2 months from the date of this notice letter> until <insert end date of leave period >. Human Resources will be advised of the period of annual leave and will automatically record the annual leave and reduce your accrued annual leave balance at the commencement of the leave period.

If there are exceptional circumstances for you not to take the leave for the period advised or you genuinely intend to make an application or plan to reduce your annual leave balance below thirty (30) days you should speak immediately with your nominated supervisor.

Yours sincerely,

*Member of Executive*

cc:        *Nominated Supervisor*  
            *Human Resources*

## 11 Long Service Leave Template Letters (E to I)

### TEMPLATE E

#### Long Service Leave Eligibility Advice

#### Sent by Human Resources with copy to Nominated Supervisor

Staff who complete 7 years' service and become eligible for long service leave will receive the following email from Human Resources confirming eligibility to commence taking long service leave, how to manage accrual and the need to plan for long service leave and information on the range of options including cashing out long service leave in excess of 9 weeks.

Email from Human Resources

Dear <Name>,

I am writing to advise that you are now eligible to take long service leave. Congratulations on this milestone with Australian Catholic University and recognition of your length of service with us.

You can check your long service leave balance via [Staff Connect](#). Your long service leave balance also appears on your payslip.

The purpose of long service leave is to recognise your length of service and enable time off for rest and relaxation, for this reason it is important that you proactively manage your long service leave balance and plan to take leave. Taking regular periods of leave also fosters a productive working and learning environment.

You should give your Nominated Supervisor at least six (6) months' notice of your intention to take long service leave, however, your Nominated Supervisor can agree to a shorter period of notice.

Long service leave is normally taken in multiples of weeks and this can be taken on full or half pay. You are encouraged to meet with your Nominated Supervisor to develop a plan to take your accrued long service leave and to make an application via [Staff Connect](#). There will be an ongoing discussion of leave plans as part of your progress plan discussion with your nominated supervisor.

You are encouraged to take your Long Service Leave now you are eligible, however in certain circumstances you may apply to cash out a portion of your long service leave, rather than taking the leave.

You may apply to cash out your Long Service Leave under the following circumstances:

- if you have accrued greater than nine (9) weeks, provided you retain a minimum balance of nine (9) weeks Long Service Leave, or;
- you can take a period of Long Service Leave and simultaneously cash out an equivalent amount of Long Service Leave.

To apply to cash out long service leave complete a "Request Cash Out Long Service Leave" form on Service Central.

It is important that you are aware that in the event that your accrued long service leave balance reaches in excess of sixteen (16) weeks (professional staff) or 4.5 months (academic staff), you may be given notice to take a minimum period of six (6) weeks and up to twelve (12) weeks long service leave, at a time convenient to the University. Where this occurs, you may wish to consider cashing out a portion of leave as detailed above.

Further information on the long service leave provisions for staff at ACU is outlined in the Long Service Leave Policy

Should you have any queries in relation to your long service leave please contact Human Resources via a Service Central request.

Yours sincerely,

Human Resources

cc: *Nominated Supervisor*

## TEMPLATE F

### **Advice to staff with Long Service Leave in excess of 9 weeks Sent by Human Resources with copy to Nominated Supervisor**

Staff who are currently in excess of 9 weeks long service leave will receive the email below from Human Resources that outlines their eligibility for the cashing out of long service leave down to a minimum of 9 weeks.

Long service leave when taken is costed against a central overhead and the cashing out of long service leave does not impact upon the operational budget of the organisational units.

Email from Human Resources

Dear <Name>,

You may not be aware that your accrued long service leave balance is currently in excess of nine (9) weeks.

The purpose of long service leave is to recognise your length of service and ideally to enable significant time off for rest and relaxation. For this reason it is important that you proactively manage your long service leave balance and plan to take leave. Taking regular periods of leave also fosters a productive working and learning environment. Where it is not possible to take a significant period of long service leave, you do have the option of cashing out a portion of your accrued long service leave.

In the first instance the University encourages you to meet with your Nominated Supervisor to develop a plan to take a significant portion of your accrued long service leave and to make an application via [Staff Connect](#).

In managing your leave balance you can consider a request to cash out a portion of your accrued long service leave, electing to either:

- cash out an amount of your long service leave provided you retain a minimum balance of nine (9) weeks, or
- take a period of long service leave and simultaneously cash out an amount of long service leave equivalent to the period of leave taken.

To apply to cash out long service leave complete a "Request Cash Out Long Service Leave" form on Service Central.

There will be an ongoing discussion of leave plans as part of your progress plan discussion with your Nominated Supervisor.

Please be aware that in the event that your accrued long service leave reaches a balance in excess of 16 weeks (professional staff) or 4.5 months (academic staff), you can be given notice to take a minimum period of six (6) weeks and up to twelve (12) weeks long service leave, at a time convenient to the University. Where this occurs or has occurred, you may wish to consider cashing out a portion of long service leave as detailed above.

Further information on the long service leave provisions for staff at ACU is outlined in the Long Service Leave Policy.

Should you have any queries in relation to your long service leave please contact the Human Resources via a Service Central request.

Yours sincerely,  
Human Resources

cc: <Nominated Supervisor >

## TEMPLATE G

### **Advice to staff with Long Service Leave in excess of 16 weeks/4.5 months (First Letter of Notice)**

#### **Email to staff member from the relevant Member of the Executive with copy to Nominated Supervisor.**

Staff who are currently in excess of sixteen (16) weeks (professional staff) or 4.5 months (academic staff) of long service leave will receive the email below from the Member of the Executive to discuss and plan with their Nominated Supervisor to reduce their long service leave by at least six (6) weeks.

Dear <Insert Name>,

You may be aware that your accrued long service leave balance is currently in excess of sixteen (16) weeks (professional staff) or 4.5 months (academic staff).

The purpose of long service leave is to recognise your length of service and ideally to enable significant time off for rest and relaxation. For this reason, it is important that you proactively manage your long service leave balance and plan to take leave. Taking regular periods of leave also fosters a productive working and learning environment.

I ask that you meet or liaise with your Nominated Supervisor within two (2) weeks of the date of this letter in order to develop a plan for you to take six (6) weeks long service leave at a date six (6) months from the date of this letter and to make an application via [Staff Connect](#) to book this leave. With the approval of your Nominated Supervisor you may wish to take the six (6) weeks long service leave at an earlier time.

To manage your leave balance, you may also want to consider a request to cash out a portion of your accrued long service leave, you can elect to either:

- cash out an amount of your long service leave provided you retain a minimum balance of nine (9) weeks, or
- take a period of long service leave and simultaneously cash out an amount of long service leave equivalent to the period of leave taken.

In addition, you may wish to discuss the taking of more than six (6) weeks leave within an appropriate time in discussion with your Nominated Supervisor.

To apply to cash out long service leave complete a "Request Cash Out Long Service Leave" form on Service Central.

I do need to make you aware that in the event that your long service leave balance is not reduced in a way described above, the University can give you notice to take a minimum period of six (6) weeks and up to twelve (12) weeks long service leave, at a time convenient to the University. In this circumstance you will be provided with 2 years' written notice (professional staff) or 12 months' written notice of the date on which the long service leave must start.

There will be an ongoing discussion of leave plans as part of the progress plan discussion with your Nominated Supervisor.

Please speak with your Nominated Supervisor in the first instance to commence the discussion on the planning of your long service leave.

Yours sincerely,

*Member of the Executive*

cc: *Nominated Supervisor*

**TEMPLATE H****Advice to staff with Long Service Leave in excess of sixteen 16 weeks / 4.5 months (Letter of direction) where no action taken to reduce leave following first communication  
Sent from the Member of the Executive with copy to Nominated Supervisor**

Where no action to reduce the long service leave balance has been taken place the staff member will receive a follow up notice to take a minimum 6 weeks leave (or a maximum 12 weeks' for professional staff) long service leave, at a time convenient to the University with the required notice.

Dear <Insert Name>,

I am writing to as your accrued long service leave balance remains in excess of sixteen (16) weeks (professional staff) or 4.5 months (academic staff) which indicates that you have not taken action, following my previous correspondence, to reduce your accrued long service leave balance.

It is the University's expectation that opportunities are made available for staff to take their long service leave entitlement and enable staff time off for relaxation, recreation, maintain a healthy work/life balance, remain connected with both family and friends, and foster a productive working and learning environment.

Consequently, the University now provides notice to take long service leave in line with clause 3.8.3.4 of the *ACU Staff Enterprise Agreement 2017-2021*. This is following discussion with your nominated supervisor the following long service leave arrangements will apply.

You are required to take <min 6 weeks – max 12 Weeks> long service leave, from <insert start date of leave must be at least 12 months from the date of this notice letter for academic staff and 2 years for professional staff> until <insert end date of leave period >. Human Resources will record the long service leave and reduce your accrued long service leave balance at the commencement of the leave period.

Following this period of long service leave the University will not require you to take any further long service leave for two (2) years.

The requirement to take long service leave on the dates above may be deferred if you provide notice of plans to take your long service leave at a particular date in the future. Your leave must be at a time that is convenient to the University and the deferral of the required period of long service leave is conditional on the leave having been approved in [Staff Connect](#).

If you are within twenty-four (24) months of your confirmed date of retirement, you are not required to take the period of long service leave detailed above. The requirement to take long service leave will be waived upon the submission of a confirmed date of retirement or where you have approval to transition to a pre-retirement contract arrangement.

In considering the utilisation of your long service leave, I remind you that you also have the additional option of cashing out a portion of your long service leave in excess of nine (9) weeks.

Should you have any questions in relation to this request you should discuss the utilisation of your long service leave with your Nominated Supervisor in the first instance.

Yours sincerely,

*Member of the Executive*

cc: *Nominated Supervisor*

*Human Resources*

## TEMPLATE I

### **Both Annual Leave greater than 40 days and Long Service Leave greater than 16 weeks/ 4.5 months**

#### **Email from Member of the Executive with copy to Nominated Supervisor**

Staff who have both an annual leave balance in excess of 40 days and a long service leave balance in excess of 16 weeks (professional staff) or 4.5 months (academic staff) will receive the following email from their Nominated Supervisor. As a priority, the annual leave accrual should be reduced first with a Nominated Supervisor lead discussion, supported by Human Resources, with the staff member to develop a comprehensive leave plan over the next two year period.

Dear <Name>,

You may not be aware that you have significant amounts of accrued leave which the University is encouraging you to utilise. Your accrued annual leave balance is in excess of forty (40) days and your long service leave balance is in excess of sixteen (16) weeks (professional staff) or 4.5 months (academic staff).

It is the University's expectation that opportunities are made available for all staff to take their annual and long service leave entitlements and enable staff time off for relaxation, recreation, maintain a healthy work/life balance, remain connected with both family and friends, and foster a productive working and learning environment.

I am sure you can appreciate that the accumulation of such high leave balances is concerning as it can have an adverse effect on your overall health and wellbeing. I therefore ask that you meet with your Nominated Supervisor to develop a comprehensive leave plan and ways to enable you to utilise your leave and indicating when you will be taking your annual and long service leave over the next two year period.

As part of the plan to reduce your leave balance I ask that you reduce your accrued annual leave balance to below thirty (30) days as a first priority and ideally plan more.

Alternatively, you may wish to consider submitting an application to cash out a portion of your annual leave and retain a balance of twenty (20) days annual leave. To apply to cash out annual leave complete a "Request Cash Out of Annual Leave" form on Service Central.

You can also consider a combination of taking annual leave and cashing out a portion of your annual leave balance as well.

In regards to your long service leave balance it is also important that you are aware that the University can also give you notice to take a minimum period of six (6) weeks and up to twelve (12) weeks long service leave, at a time convenient to the University. In this circumstance you will be provided with a minimum of six (6) months written notice of the date on which the long service leave must start.

In order to effectively manage your long service leave balance you may also want to consider requesting to cash out a portion of your accrued long service leave, by electing to either:

- cash out an amount of your long service leave provided you retain a minimum balance of nine (9) weeks, or
- take a period of long service leave and simultaneously cash out an amount of long service leave equivalent to the period of leave taken.

To apply to cash out long service leave complete a "Request Cash Out Long Service Leave" form on Service Central.

As the first step in enabling you to take and plan both your annual leave and long service leave over a two year period, please make a time to meet with your Nominated Supervisor, to discuss the options described above and to identify what may be required to assist you in taking your leave entitlements.

Yours sincerely,

*Member of the Executive*

cc: *Nominated Supervisor*  
*Human Resources*

## Appendix A – Amended enterprise agreement provision

### 3.8.3 The Planning and Taking of Long Service Leave

#### *Professional staff*

- 3.8.3.1 A staff member who is entitled to Long Service Leave will take the leave at a time or times that are mutually convenient to the University. The staff member must give the University six (6) months written notice to take the leave unless the University agrees to a shorter period of notice.
- 3.8.3.2 A staff member will normally take periods of long service leave in multiples of weeks and may take the leave on full or half pay.
- 3.8.3.3 In exceptional circumstances, a staff member, upon written request, may be granted approval to take their Long Service Leave for minimum periods of one (1) or two (2) days per week normally for a minimum period of three (3) months. Such circumstances include but are not limited to where a staff member has approval to transition to a pre-retirement contract arrangement.
- 3.8.3.4 If a staff member has a Long Service Leave entitlement of more than sixteen (16) weeks, the University may provide them with written notice to take up to 12 weeks leave, at a time convenient to the University, provided that:
- (i) The staff member must start their long service no later than 2 years from the date of the University's notice;
  - (ii) A staff member cannot be required to take Long Service Leave within twenty-four (24) months of the staff members confirmed date of retirement;
  - (iii) The minimum period of long service leave that the University can require a staff member to take is six (6) weeks;
  - (iv) The University cannot require a staff member to take any further Long Service Leave for two (2) years after taking leave under this sub-clause; and
  - (v) A staff member who provides notice of their plans to take Long Service leave at a particular date in the future may apply for deferral of the application of this sub-clause.

#### *Academic staff*

- 3.8.3.5 Subject to 3.8.3.6, an academic staff member who has qualified for long service leave is entitled to take long service leave at a time of their choosing, provided that they give the University at least 6 months' written notice of such leave is given or, in the absence of such notice, the University consents.
- 3.8.3.6 Where an academic staff member has accumulated a long service leave entitlement in excess of 4.5 months, the University may give the staff member written notice to take up to 3 months of such leave, at a time convenient to the needs of the institution, provided that:
- (i) the University must give the staff member at least 12 months' written notice of the date on which leave must commence;
  - (ii) the University cannot require the staff member to take long service leave within 24 months of the staff member's intended date of retirement;
  - (iii) the minimum period of leave the University can require a staff member to take is 6 weeks;

- (iv) if the staff member has been directed to take leave under clause 3.8.3.6, the University cannot require the staff member to take a further period of long service leave for a period of 2 years after the end of that period of leave.
- (v) A staff member who provides notice of their plans to take Long Service leave at a particular date in the future may apply for deferral of the application of this sub-clause.

### **3.8.4 Cashing out Long Service Leave**

3.8.4.1 In circumstances where a staff member has become eligible for long service leave, that staff member may elect to cash out a portion of their accrued Long Service Leave credits such that either:

- (i) the staff member will retain a minimum balance of nine (9) weeks, or
- (ii) the staff member may apply to take a period of long service leave and may also apply to cash out an equivalent amount of long service leave.

3.8.4.2 The staff member will receive payment at the rate equivalent to the amount the staff member would have received for working their ordinary hours during the period of long service leave to be cashed out.

3.8.4.3 In addition to the application to cash out some of their long service leave, the staff member must provide written notice to the University stating that they wishes to forego taking the Long Service Leave.

3.8.4.4 If a staff member wishes to forego an entitlement to take an amount of Long Service Leave (in accordance with this clause) the University will pay the staff member, within a reasonable timeframe, the amount of monies the staff member is entitled to receive in lieu of the amount of Long Service Leave.

### **3.8.5 Payment of Untaken Long Service Leave on Termination**

Where a staff member ceases employment with the University after seven (7) years recognised service; or after four (4) years recognised service where the staff member retires at their superannuation preservation age or later (including on the grounds of ill health), or dies; the University will pay to the person or their estate equivalent monies to the amount of accrued Long Service Leave not taken.