

No 515/2019

Tuesday 27<sup>th</sup> August 2019

## Annual Leave/Resourcing Guidelines

Dear Colleagues,

As with previous years, a set of National joint guidelines has been agreed in order to assist representatives when discussing and concluding 2020-21 annual leave arrangements with local managers, which should be concluded in line with the Way Forward Agreement by 31st October 2019.

Whilst the attached guidelines mainly reflect previous year's arrangements, particular attention is drawn to Branches regarding the following:

The "Annual Leave Calendarisation Work Aide" information/guide tab will assist managers and reps in undertaking the correct process to establish leave demand and populate the work aide accordingly. Whilst stressing the point that the Work Aid is a guide and should therefore be used as such.

The focus is on concluding a robust and reliable Annual Leave Plan/Agreement that includes all individuals' legally contractual leave entitlements as its primary driver, whilst also identifying extra leave slots in low traffic periods over and above those agreed to facilitate the taking of additional leave and therefore maximising choice of leave slots for individuals.

The existing National agreements, guidelines, agreed tools, procedures and processes in place to support resourcing on an ongoing basis are **not** affected by these annual leave/resourcing guidelines. They remain firmly in place and will in fact be used to support the process and assist in providing a balanced approach to year round leave allocation and resourcing.

Managers and reps will also need to establish the total number of owed weeks above the leave year's contractual entitlement which need to be documented in your agreements and arrangements agreed locally put in place to deal with it.

Additionally, set out below is guidance that has previously been communicated to representatives but is worth repeating especially for representatives entering into leave agreements for the first time:

It is essential when entering discussions that CWU representatives establish and allocate the unit's contractual entitlement first which will in turn identify the number of leave reserves required to enable reliable resourcing.

**“Vacancies and leave reserve vacancies should remain under constant review to ensure adequate resource is available to meet customer and operational requirements”.**

When establishing leave demand include all staff contractual leave, Bank Holiday credits for annual leave that coincides with Bank Holidays and rest days that fall on a Bank Holiday, purchased leave, and any leave days carried over from the previous year. Your DOM should have this information in their Manpower Plan that you need to check to ensure all contractual and carried over leave has been captured.

The number of weeks can be checked through this calculation below and should be cross referenced with the number of leave weeks in PSP that are in the Annual Leave Calendarisation aide, and the relevant adjustments made.

For example:

*If the above added up to 600 weeks to be allocated and covered and 2 weeks were closed for Christmas Pressure the number of leave reserves to cover AWD would be 12,  $(600 / 50) = 12$ . Add to this the leave reserves leave 12 @ 5 weeks = 60 weeks would mean another leave reserve  $(60 / 50) = 1.2$ .*

In this example that would mean that a minimum of 13 leave slots a week for 50 weeks should be available. If you then agree to open up another 3 slots due to agreed absorption through the summer weeks then in the period June to August the number of open slots available should be 16.

This is just one flat line example. Units may decide not to employ against all 13 reserves and convert some to S/A, or overtime. This is subject to local discussion and agreement.

As a consequence of providing additional leave slots in the summer period there may be leave gaps in the 'winter' period, notwithstanding other absence, which you may need to discuss and agree a plan to deal with. There could be more people available in the unit, bearing in mind traffic/workload traditionally increases during this period. This should be dealt with via weekly resourcing meetings and subject to agreement.

Branches should progress any disagreements in regards to managers refusing to fully engage and adhere to these guidelines in establishing annual leave plans/agreements through the IR Framework as appropriate.

Further National discussions continue with Royal Mail within the Performance JWG regarding the impact of owed/carried over annual leave as a result of the shorter working week, the review of the Weekly Resourcing Agenda, and future de-coupling of the Annual Leave arrangements and WRM Agenda which is currently within one document. It is intended to incorporate these changes into a revised set of National guidelines and further updates will be provided to Branches as these discussions progress.

Any queries to the content of the above, please contact the Outdoor Department, reference: 445, email address: [outdoorsecretary@cwu.org](mailto:outdoorsecretary@cwu.org).

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