

# Internal Transfer Policy

*We will provide this policy on request at no cost, in large print, in Braille, on tape or in another non-written format.*

## **Introduction**

To ensure the transfer of employees within the organisation is as smooth and effective as possible it is recommended that the following guidelines be adhered to.

For the purpose of clarifying the meaning of service and transfers within this policy, employee's contracts state a service and a location where the employee will be based. If there is more than one location within the service, the employee may be required to work between these locations. This would not be classed as a transfer in relation to this policy. The internal transfer policy would only be applicable if moving to a location out with the stated service and to an equivalent post.

Under Loretto Housing's terms and conditions it states that from time-to-time staff may be required to transfer to or accept secondment from one location to another as may be considered reasonable in the service of the organisation.

## **Employee Transfer Application**

If an employee wishes to transfer within the organisation, an internal transfer application form should be completed and passed to their Line Manager. All Loretto Housing Care transfer applications are held on file by People Services.

Applications will only be accepted for transfer where the employee has completed one year's experience in their current service/section. There may be exceptional circumstances when this timescale may not apply such as occupational health recommendations that cannot be accommodated within the employee's current service/section.

## **Procedure for Transfer Requests**

All internal transfer applications should follow these guidelines:

- The employee's current Supervisor and/or Deputy Service Manager/Service/Section manager will meet with the employee to discuss the suitability for transfer and agreements will be reached on what supervision information is required. A staff transfer handover sheet will be completed by the employee and current Supervisor and forwarded to the new Supervisor prior to any transfer meeting taking place.
- Where agreements cannot be reached on the information to be passed over, this should proceed to the Deputy Service/Service/Section Manager whose decision will be final
- A three-way meeting should take place between the employee, their present supervisor and the Deputy Service/Service/Section Manager of the Service they may be transferred to.
- At this meeting all outstanding issues, on-going training, strengths etc should be discussed.
- Consideration should be given to the employee's personal circumstances, the impact on both services of any formal training the employee may be going through and individual development plans.

- The details of the meeting will be recorded and a copy given to the employee and a copy held on file.
- If the transfer goes ahead the employee's file will be transferred detailing, their attendance, annual leave allocation, KWDM Minutes, training required/received, correspondence and appraisal records.

### **Refusal of Transfer**

If a transfer is refused the employee will be supplied with details of why this decision was reached. This will be provided by the Deputy Service/Service Manager/Section of the potential service/section who has the final decision. A meeting will take place and the content of the meeting minuted.

Reasons for refusal may include the Deputy Service/Service/Section Manager's view that the employee concerned does not have the specialist knowledge and/or experience required or that lone working for the employee concerned is not considered suitable.

The outcome of this meeting will be confirmed in writing. Should you be dissatisfied with the response you may pursue this under the grievance procedure.

### **Employees Transferred by the Organisation**

Where Loretto Housing is transferring employees from one service/section to another, a meeting will be held to discuss the situation prior to the transfer this will be attended by the employee and Deputy Service/Service/Section Manager.

At this meeting the following areas will be addressed and minuted -

- a. Reasons for the transfer
- b. Timescales for the transfer
- c. If the transfer is a permanent or temporary move
- d. Relocation cost if appropriate
- e. Salary changes if appropriate
- f. If a temporary transfer the procedure for returning to their service
- g. Annual Leave allocation
- h. Learning objectives for the transfer where appropriate.
- i. Whether specialist knowledge needs to be acquired and how,

All other procedures remain as for transfer requests.

The organisation will endeavour, where possible, to give employee's one-month notice of any necessary adjustments to their domestic arrangements.

However, there will be emergency occasions when it will not be possible to give such notice and where this is the case the organisation will endeavour to be as flexible as possible with regard to individual circumstances.

## **Recruitment**

Recruiting managers must check the transfer file prior to advertising vacant posts.

If an internal transfer request is received after advertising an internal vacancy for the same service/section as the request, employees should be aware that their transfer request would not be considered for that vacancy. Employees would be required to apply for the post using the organisation's recruitment process.

## **Protection of Salary**

Employees who the organisation request to transfer to a post which attracts a lower salary than their current post will be offered 6 months' protection of salary from the date of transfer.

Employees who request a transfer to a post which attracts a lower salary than their current post will not receive protection of salary.

## **Change of Service**

Employees who the organisation transfer to another service will be entitled to receive reimbursement of additional travel expenditure for a period of six months.

Employees who change their service at their own request will be liable to pay additional travel expenses themselves as per the Travel and Subsistence Policy.

**LORETTO HOUSING ASSOCIATION/  
INTERNAL TRANSFER APPLICATION FORM**

**NAME:** \_\_\_\_\_ **SERVICE/SECTION:** \_\_\_\_\_

**Date of Commencement:** \_\_\_\_\_

**1/ Service/Section Transfer Request for:** \_\_\_\_\_

**2/ Reason for Transfer Request**

**3/ Supporting Statement Supplied:** **Yes/No**

**4/ Have you applied for flexible working in the last 12 months?** **Yes/No**  
**Please provide details of your current work pattern/hours**

**5/ Do you consider yourself to have a disability?** **Yes/No**

**If yes, please provide details of any adjustments you require or current adjustments already in place**

**Employee Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**6/ Transfer Application Approved**  
**If no, reason for rejection**

**Yes/No**

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**Line Manager Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**LORETTO HOUSING ASSOCIATION**  
**INTERNAL TRANSFER HANDOVER SHEET**

Employee \_\_\_\_\_ Date \_\_\_\_\_

Current Supervisor \_\_\_\_\_ New Supervisor \_\_\_\_\_

Transferring from \_\_\_\_\_ \*Service/Section (\*delete as applicable)

Transferring to \_\_\_\_\_ \*Service/Section (\*delete as applicable)

Start Date \_\_\_\_\_ Date of Transfer Meeting \_\_\_\_\_

*This form should be completed by the employee and current supervisor, the employee's supervision minutes, staff development profile, appraisal minutes and Loretto Housing's Internal Transfer policy should be consulted, when completing this paperwork.*

**Knowledge**

**Skills**

**Attitude**

**Strengths**

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**Attendance**

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**Work Practice**

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**Team Working**

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**Training Record – Training Received to-date** (statutory and non statutory, dates and renewal dates)

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**Development / Relevant Qualifications / Training Required**

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**Supervision Issues and frequency of sessions** (include last date of supervision)

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**Staff Continuous Development Portfolio in place YES/NO** (is this up to date)

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**Last Appraisal Date** \_\_\_\_\_ **Next Appraisal Date** \_\_\_\_\_

**Any other note of interest / outstanding issues / personal considerations**  
(Equality Act 2010, Flexible working, etc)

**Determine if PVG Application required. Completed YES / NO** (If no record why not, and date when this will be completed, if yes record date completed and passed to HR)

**If required - S.S.S.C Registration** (i.e. registered or not, if registered, registration number, check that it is up-to- date, if not does the staff member have the necessary qualification in place for when registration date takes affect, if not what action are in place to address this)

**Change of Staff Details Form Completed YES/NO** (if not - record why not, if yes - record date completed and passed to ACM)

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Current Supervisor \_\_\_\_\_ Date \_\_\_\_\_

*Please sent a signed copy to new supervisor before date of transfer meeting – this is to allow for preparation. Thank you*