

## **Protocol for the transfer of staff**

### **Introduction**

1. A system that provides for the orderly and timely transfer of staff between organisations is now required. This note deals with the transfer of staff serving in the same or recognised equivalent grades<sup>1</sup>.

### **Sequencing of transfers**

2. The document which provided the framework for the operation of the CAF and subsequent transfers stipulated how preferences under the CAF system would be ranked. However, actual transfers between organisations need not necessarily take place in the same order as the ranking of applicants under the CAF. The timing of transfers will need to be managed in a way which respects the business needs of the organisations concerned, reflects the circumstances of individual applicants and takes full account of the total number of applicants for the available posts in the grade and location concerned<sup>2</sup>. In particular, applicants with a lower ranking on the CAF may be transferred before those with a higher ranking provided the latter do not lose out in terms of seniority as a result.

3. In the event that a decentralising Department intends to adopt a different sequence to that indicated by the CAF rankings, it will ensure that applicants with a higher ranking are advised – through their Personnel Officer - that their applications will be processed at an appropriate time. It should also arrange for the applicants to confirm in writing their continued interest in moving to the location concerned.<sup>3</sup>

### **Vetting of PAS data**

4. Departments/Offices have been asked to return corrections to their internal and outgoing lists by 14 January 2005. This material is vital in ensuring the ongoing accuracy of the data being supplied to participating organisations.

5. The PAS will supply all decentralising organisations with details of applicants who wish to transfer into their organisations in order to relocate. The PAS will give priority to the organisations identified as “early movers”. These are expected to issue by mid-February.

6. When these lists are received in decentralising organisations, they should be examined by each Personnel Officer. Again, any errors coming to light should be notified to the PAS. As a matter of practice, no approach should be made directly to any CAF applicant in another organisation. All approaches for clarification/discussion should be made to the Personnel Officer of the applicant’s organisation.

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<sup>1</sup> It has been agreed with the CPSU and the PSEU that the equivalent grades listed on each Departmental promotion circular are correct. AHCPS have indicated that they still have outstanding issues.

<sup>2</sup> For example, it is unlikely that the early transfer of staff currently serving outside Dublin would suit either the department or the individual concerned.

<sup>3</sup> A suitable draft model letter will be agreed with DLOs.

### **Internal transfers**

7. Staff already serving in posts being decentralised or at the same grade in other posts in the same department may now be moved: some organisations have already started making such internal transfers.

### **Inter-Departmental transfers**

8. When the inter-departmental lists are issued by the PAS they will allow DLOs and Personnel Officers to identify and progress potential bi-lateral transfers. The management of these transfers can best be arranged between Personnel Officers.

9. Departments will also be free to arrange other bilateral transfers or inter-departmental transfers involving more than two departments on a mutually agreeable basis and should pursue such opportunities.

### **Formal offer of position**

10. Prior to the issue of each formal offer the Personnel Officer in the originating Department will, in all cases, supply the standard documentation in relation to the applicant's sick leave (Form T.Gen 20) and performance record (Form A). The Personnel Officer making the offer of transfer will satisfy himself/herself that these are in order. When it has been agreed through contact at Personnel Officer level that a particular CAF applicant may transfer with a view to relocation the Department with whom the applicant will relocate will issue a formal offer of transfer in writing to the applicant. This will include formal confirmation of the location of the post and the requirement for the minimum attachment to that location (three/two years). The applicant will be allowed a period of five working days to either accept or reject the formal offer. If the applicant is agreeable to accept the transfer offer, a date for transfer will be agreed at Personnel Officer level.

### **Option to change first preference location**

11. It has been agreed that staff who applied to the CAF before 7 September 2004 will be given preference over those who applied after that date. It was also agreed that applicants to the CAF could express a total of ten preferences in relation to their desired location. All of the material issued to date by the PAS relates only to first preference locations. The inter-departmental lists to be issued shortly will also include only first preference locations.

12. Where the number of first preference applications received before 7 September 2004 is less than the number of available posts in a grade/location, the PAS will contact priority applicants who specified that location as a lower preference and offer them the option to alter it to their first choice location. Applicants who opt to alter their preferences in this way will be offered places in keeping with the rankings agreed for the operation of the CAF. Any vacancies remaining after these "change of mind" applicants have been accommodated will be offered to those applicants who applied to the CAF after 7 September 2004. The latter applicants would be ranked in order of date of application.

13. In the event that there are still vacancies remaining after facilitating all first preference applicants for a location, departments may choose to fill the post by making offers to applicants who listed the location as a lower preference. However, in considering this option, departments should be aware that an opportunity to accommodate the person in a location of higher preference may arise in the future and that, in such

circumstances, it will be necessary to make every reasonable effort to accommodate the person by offering them their higher preference.

### **Seniority issues**

14. All officers in grades represented by unions other than the CPSU will be placed on the seniority list of their receiving Department in keeping with their service in the grade. This means that their seniority will not be adversely affected by the timing of the actual transfer.<sup>4</sup>

15. There will be bilateral discussions between the Department of Finance and the CPSU to agree arrangements designed to ensure that seniority will not be adversely affected by the timing of the actual transfer.

16. If there is any doubt as to the relative seniority of an applicant this will be established with the Personnel Officer of the applicant's Department.

### **Transfers involving posts remaining in Dublin**

17. A situation may arise where an applicant who is interested in relocating with one of the early mover departments is from a department/office which is not decentralising. Similarly, a department which is only partly decentralising may be prepared to release someone who is interested in relocating with one of the early mover departments and to accept in return someone from that department who wishes to remain in Dublin.

18. In order to allow such transfers to proceed, it will be necessary to put in place arrangements to address the position of staff who want to remain in Dublin but who will have to transfer to other departments as there will no longer be posts available in Dublin in their existing department. The Department of Finance is preparing a paper on this for discussion with the unions.

### **Same location applications**

19. As provided for in the CAF discussion document, applications for transfer within the same geographical location will not be allowed at this stage. In general, within the same location will be taken to mean the same town (e.g. an application for transfer within Longford town). The only exceptions to this rule will be where Departments have existing collective agreements with unions relating to transfers between adjoining towns.

### **Resolution of problems arising**

20. The Central Decentralisation Unit will continue to convene regular meetings of the "early movers" DLO Group and periodic meetings of the full DLO Group. At these meetings issues which have arisen from the operation of the bi-lateral and other transfers will be discussed and resolved. In exceptional circumstances where Departments are not able to agree on the terms on which the transfers detailed above can take place the Department of Finance will agree to act as mediator to bring the issue to a conclusion.

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<sup>4</sup> Particular issues arise in relation to the Office of the Revenue Commissioners during the transition to integration. Discussions will be held with the relevant unions.

**Reporting back/updating lists**

21. Paragraph 9 above deals with the issue of formal offers of inter-Departmental transfers to applicants for relocation. At the end of every month each Personnel Officer will report back to the PAS giving details of those applicants who have accepted or rejected offers of transfers into the Department. This will allow the PAS to maintain accurate records on an ongoing basis.