



Administrative Procedure

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| Number: | 356 |
| Effective: | 7/3/89 |
| Supercedes: | 9/13/82 |
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Subject: TRANSFERS

1.0. PURPOSE:

To establish the policy and procedure governing requests from employees for transfers within the university, excluding academic and academic administrative positions.

2.0. ORGANIZATIONS AFFECTED:

- 2.1. All organizational units of the University, excluding auxiliary organizations, Unit 3 (Faculty), and those positions requiring formal consultation with the Academic Senate.
- 2.2. Important: This procedure, or portions thereof, may be superseded by an agreement between The California State University and an exclusive representative developed as a result of collective bargaining.

When referring to this procedure as it relates to actions affecting represented employees, consult the agreement that applies to employees within the represented unit.

3.0. REFERENCES:

- 3.1. California Administrative Code, Title 5, Section 42702(c).

4.0. POLICY:

4.1. It is the policy of the University to, under certain circumstances, allow an employee to transfer from a position in the employee's assigned department to a like or similar position in another department. Transfers may be approved for the following reasons:

- 4.1.1. Health and/or safety of the individual or other individuals in the office/department.
- 4.1.2. When deemed to be in the best interest of the University or the employee to be transferred.

Approved:

Date:

4.2. Transfers are not usually approved under the following and/or similar circumstances if the employee is:

4.2.1. Performing at an unsatisfactory level and there are not mitigating factors such as poor supervisory practice.

4.2.2. Subject to disciplinary action.

5.0. DEFINITIONS:

5.1. Transfer--The movement from a specific position to a like or similar position.

5.2. Reassignment--An administrative decision to move an employee from one position to another consistent with the best interests of the University or the employee.

5.3. Transfer Request--The voluntary request of an employee to transfer from the employee's present position to a like or similar position.

5.4. Courtesy Retreat Rights--An option that may be granted to a transferring employee to return to their former position within three (3) months if the transfer proves to be unsatisfactory for either the employee or the new supervisor. Courtesy retreat rights are not granted automatically, but at the discretion of the former supervisor.

6.0. RESPONSIBILITIES:

6.1. Employment Services Manager will:

6.1.1. Meet with the employee requesting a transfer and determine the reason for the transfer request.

6.1.2. Contact the employee's supervisor and discuss the issue if a transfer tentatively appears to be the best solution.

6.1.3. Upon final determination that the best solution is a transfer, contact other supervisors and attempt to find a suitable position for the employee.

6.1.4. Indicate to supervisors contacted, the circumstances surrounding the request for transfer in order that all factors can be considered in reaching a decision.

6.2. Department supervisors contacted will give full and fair consideration to requests for transfers.

7.0. PROCEDURES:

7.1. An employee desiring a transfer will:

7.1.1. Discuss the intention to seek a transfer with his/her immediate supervisor, unless it would be imprudent to do so under the circumstances. If necessary, the employee may contact the Employment Services Manager.

7.1.2. Not contact other departments in an attempt to arrange a transfer.

7.1.3. Notify the Employment Services Manager immediately if a decision is made not to pursue the transfer request.

7.2. The employee's supervisor will:

7.2.1. Upon notification of the employee's desire to seek a transfer, explore the reasons with the employee and support the request if it seems the best resolution of the issue. If not, the supervisor will recommend alternative solutions and assist the employee in reaching his/her goal.

7.2.2. If a transfer is the best method of meeting the employee's goals, the supervisor will authorize time for the employee to contact and to discuss employment opportunities with the Employment Services Manager.

7.3. The Employment Services Manager will:

7.3.1. Discuss the circumstances surrounding the request for transfer with the employee.

7.3.2. If the transfer seems tentatively the best resolution of the issue, the Employment services Manager will:

7.3.2.1. Advise and discuss the issue with the present supervisor.

7.3.2.2. Explain courtesy retreat rights and ask if the supervisor will grant the employee retreat rights should a transfer be effected.

- 7.3.3. Upon a determination that a transfer is the best solution to the issue, the Employment Services Manager will:
 - 7.3.3.1. Contact other departments and attempt to arrange a transfer, providing complete information concerning the circumstances surrounding the request.
 - 7.3.3.2. Indicate that credit towards tenure or tenure in the employee's classification transfers with the employee.
 - 7.3.3.3. Indicate whether the employee's present supervisor has agreed to grant courtesy retreat rights for the employee.
- 7.3.4. Schedule an interview for the employee with the potential supervisor.
- 7.3.5. If the employee and the potential supervisor agree to the transfer, the receiving department will submit a Job Description, HRM-151A, to Employment Services and prepare and forward a Staff Transaction Form, HRM-884A, to the Budget Office.
- 7.3.6. Complete and approve the Staff Transaction Form as required, and confirm the transfer by preparing and distributing a Staff Notification Form, HRM-885A.
- 7.3.7. If a transfer cannot be arranged, the Employment Services Manager will notify the employee and explore other feasible alternatives.
- 7.3.8. If the issue involves health/safety, the Director of Human Resource Management shall be notified when all efforts to achieve a transfer and/or alternate solutions are unproductive.

8.0. APPENDICES:

- 8.1. Staff Transaction Form, HRM-884A.
- 8.2. Staff Notification, HRM-885A.
- 8.3. Job Description, HRM-151A.