



THE UNIVERSITY OF MICHIGAN

STANDARD PRACTICE GUIDE

SECTION:	Personnel	Number:	201.61
		Revised:	7/01/04
SUBJECT:	Transfer: Promotional, Lateral, and Demotional	Date Issued:	
		Attachment(s)	0
APPLIES TO:	Regular primary, coaches in the athletics job family, professional/administrative (excluding instructional and those in bargaining units*), and technical staff members		
ISSUED BY:	The Personnel Office and the Office of the Vice-President for Academic Affairs		

I. Policy

The University may reassign staff members by transferring them from one position to another in the same or another classification. Transfer will be made without regard to the non-relevant factors of race, creed, color, national origin, ancestry, age, or sex except where sex or age are bona-fide occupational requirements.

II. Regulations and Definitions

A. Promotion

A promotion is movement to a position in another classification at a greater level or responsibility.

1. A promotional transfer will normally be accompanied by an increase in compensation.
2. Vacancies will not normally be filled from outside the University until a reasonable effort has been made to consider qualified University staff members.
3. The transfer date normally should not be later than four (4) weeks from the date of acceptance by a staff member.
4. A promotion may be initiated by the University or as the result of consideration of a request by a staff member.

B. Lateral

A lateral transfer is movement to a position in the same classification or to a position in another classification at a similar level of responsibility.

* When transferring members of bargaining units, refer to pertinent definitions and provisions of the appropriate labor agreement.



THE UNIVERSITY OF MICHIGAN

STANDARD PRACTICE GUIDE

1. A lateral transfer may be initiated by the University or as the result of a request by a staff member.
2. A change in salary will not normally accompany a lateral transfer.
3. The transfer date normally should not be later than four (4) weeks from the date of acceptance by the employing unit.

C. Demotional

A demotional transfer is movement to a position in another classification at a lesser level of responsibility.

1. A demotion may be initiated by the University or as the result of consideration of a request by a staff member, when factors beyond the control of the staff member or supervisor prevent the staff member from effectively performing in his current position.
2. A demotion may not be used as a form of disciplinary action.
3. A demotion would normally be accompanied by a reduction in salary.

D. No staff member is guaranteed a transfer.

E. Staff members must have prior satisfactory work performance in order to be given consideration for a promotional transfer.

III. Procedure

A. Promotional Transfer

RESPONSIBILITY

ACTION

Employing Unit

1. Submit a "Request for Personnel" (Form 5197) or Notification of Open Position (Form 9823) when an opening has been created or will develop through attrition.

Employment Section or
the Office of Professional/
Administrative Staff Services

2. Review with employing unit, alternatives for filling the position.
 - a. Promotable staff members from within the employing unit.
 - b. Promotable staff members outside the employing unit.
 - c. Outside applicants for employment.



THE UNIVERSITY OF MICHIGAN

STANDARD PRACTICE GUIDE

RESPONSIBILITY

ACTION

- | | |
|---|--|
| Employing Unit | 3. Post the position and screen the applicants. |
| Employment Section or
the Office of Professional/
Administrative Staff Services | 4. Select replacement. |
| | 5. Coordinate starting date and pay increase and communicate with the promoted staff member, the receiving department and the staff member's present department. |
| | 6. Complete the Request for Personnel Form 5197 or 9823 and send it to the Compensation Section for processing. |

B. Lateral Transfer

RESPONSIBILITY

ACTION

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|---|--|
| Employing Unit | 1. Submit a "Request for Personnel" (Form 5197) or Notification of Open Position (Form 9823) when an opening has been created or will develop through attrition. |
| Employment Section or
the Office of Professional/
Administrative Staff Services | 2. Post the position and screen the applicants. |
| | 3. Clear incumbents for interview and/or refer applicants for employment for interview. |
| Employing Unit | 4. Select replacement. |
| Employment Section or
the Office of Professional/
Administrative Staff Services | 5. Coordinate starting date and communicate with the staff member, the receiving department and the staff member's present department. |
| | 6. Complete the "Request for Personnel" (Form 5197) and send it to the Compensation Section for processing. |



THE UNIVERSITY OF MICHIGAN

STANDARD PRACTICE GUIDE

C. Demotional Transfer

RESPONSIBILITY

ACTION

Employing Unit

1. Inform Employment Section concerning the need for demoting a staff member.
2. If the problem is associated with misconduct and may not reasonably be resolved by transfer:
 - a. Send information received to the Employee and Union Relations Section.
 - b. Discuss problem with the supervisor and provide guidance to resolve the problem.

Employee and Union Relations Section

Employment Section or the Office of Professional/ Administrative Staff Services

3. Assist the staff member and the employing unit supervisor in the location and/or assignment to a less responsible classification which he is able to perform, either within the department or elsewhere within the University.
4. Coordinate starting date and communicate with the staff member, the receiving department, and the staff member's present department.
5. Complete the "Request for Personnel" (Form 5197) and send it to the Compensation Section for processing.