A. Scope

This policy applies to all Service Staff employees at Bloomington, IUPUI, and South Bend.

B. Policy Statement

1. It is the policy of the University to support the efforts of earnest and self-motivated employees to advance in employment by acquiring and/or improving those skills that would qualify them for higher-level positions.

2. Employees interested in promotion or transfer must keep their employment skills inventories up-to-date with the campus human resources office.

3. Successful upward mobility for employees may be accomplished through a promotion within the department or by transfer and promotion within another department. Consequently, managers and supervisors are expected to consider employees for promotion within their own departments and to allow them opportunities to seek transfers to other departments. An atmosphere conducive to exploring promotion or transfer must be maintained.

C. Procedures

1. See the Process for Recruitment and Selection policy for a description of the general procedures to use when filling a position.
2. Selections (including promotions and transfers) should be made by examining all factors necessary to determine the best qualifications and capabilities to fill the position. These factors shall include, but not be limited to the following which are not listed in rank order:
   a. At Bloomington and IUPUI:
      i. Experience
      ii. Past performance
      iii. Job-related educational background
      iv. Ability and qualifications to perform the essential functions of the position with or without reasonable accommodation
      v. Attendance record over the last twelve (12) months (not including extended periods of sick leave of two weeks or more due to serious illness or injury or approved leaves of absence)
   b. At South Bend:
      i. Seniority
      ii. Experience
      iii. Past performance
      iv. Job-related educational background
      v. Ability and qualifications to perform the essential functions of the position with or without reasonable accommodation
      vi. Attendance record over the last twelve (12) months (not including extended periods of sick leave of two weeks or more due to serious illness or injury or approved leaves of absence)

3. When qualifications and capabilities are found relatively equal, employees should then be ranked in order of occupational unit seniority date (in the occupational unit of promotion) first and University seniority date second.
   a. At Bloomington, for SM positions, employees in the SM functional classification are defined as having more seniority than employees in other functional classifications.

4. Unless otherwise mutually agreed to by management, employee, and the union, and except for openings occurring in jobs of a unique nature requiring unusual skills and abilities, an employee must work on a job for the following times:
   a. Three (3) months before requesting a promotion to another job
   b. Six (6) months before requesting a transfer to another job.

5. At Bloomington and South Bend, when seniority is not followed in promoting an employee within the Service Maintenance classification, departments must be prepared to show that the qualifications of the employee selected are significantly greater. The employee or an AFSCME representative on behalf of the employee is entitled upon request to reasons in writing for not following seniority in the selection process.
6. An employee should not be given a transfer commitment until the employee's present department head has been informed. A start date should be discussed; a two week notice is required. A notice period of less than or more than two weeks must be agreeable to the employee, the employee’s current supervisor, and the employee’s new supervisor. Interdepartmental transfers are to be coordinated through the campus human resources office.

7. Additional policy information
   
a. For promotions or interdepartmental transfers, the HRMS documentation is to be initiated by the new department.
   
b. Each supervisor must determine what is "reasonable" time away from the job for interviews and activities related to seeking a promotion or transfer, keeping in mind the university’s favorable attitude toward promotion and transfer. If a supervisor believes that the employee's absences are excessive, then he or she can require the employee to make up the time or charge excessive absences to accumulated time off benefits.
   
c. Employees transferred or promoted to a position with a higher salary grade on the SM salary schedule are entitled to a minimum increase of three percent. This increase is to be given provided the new salary rate does not exceed the maximum of the new salary grade.
   
d. Lateral transfers will normally be made at the incumbent's current salary. An employee will not receive a salary increase for such a transfer.
   
e. When it is contemplated that an employee is going to be transferred to a lesser classification, the campus Human Resource office must be contacted. A review of the employee's salary history and a salary determination will be made by the campus Human Resource office. The reason for the action, such as a reclassification, RIF, employee initiated application for a job, or demotion as part of corrective action, will be a factor. See the Position Classification policy provisions for moving to a lower classified position.
   
f. Sixty Day Trial Period: Service Maintenance employees will successfully complete a 60 calendar day trial period before the transfer or promotion becomes final. If the employee is disqualified during the trial period, the disqualification must be on merits subject to the grievance procedure. See the Trial Period for Promoted or Transferred Employees policy for the procedures covering this process.
   
g. An employee's time-off benefits will be transferred between departments and campuses, except that accrued compensatory time off is to be paid or granted by the employee's current department before the promotion or transfer occurs.

D. Sanctions
Managers, supervisors, and employees who violate this policy are subject to corrective action, up to and including separation.

E. Web Address for this Policy
F. Related Information

Recruitment Selection Policy

Position Classification Policy

Trial Period for Promoted or Transferred Employees

G. History

In the Spring of 2012, Indiana University administration and AFSCME Council 62 leadership worked to merge the personnel policies covering Service (SM) Staff at Bloomington, IUPUI, and South Bend into one set of policies. This is one of the 27 policies that is the product of their work. Effective July 1, 2012, it brought together the provisions that were the same on all three campuses; eliminated differences when agreement could be reached; and identified those provisions in which differences remained.