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A commitment was made at the Civil Service Management Board (CSMB) in January 2016 that departments will develop and publish an official internal mobility policy (Appendix A) in line with these Guidelines, which are based on:

(a) The agreed CSMB guiding principles for Civil Service mobility policies (Appendix B);
(b) Best practice across the Irish Civil Service; and
(c) Best practice across a number of European Civil Services.

It is recognised that internal mobility will not require the same approach in each department due to the diversity in their size, business strategies and mix of generalist and professional/technical positions. Policies may vary in their duration, arrangements and operation. Departments can determine the mandatory nature and frequency of mobility in line with workforce planning. Internal mobility should be considered in the first instance to ensure business continuity within the organisation prior to consideration of an interdepartmental move (see Appendix C).

The target is to achieve a balance between business needs, developmental opportunities and the scale of turnover in grades and divisions to avoid disruption and counter-production. It is acknowledged that it can be challenging to successfully implement internal mobility and that some departments have faced many obstacles in the past (Appendix D).

The intention of these guidelines is to provide direction rather than be prescriptive on:

- The benefits of internal mobility.
- The role of the stakeholder.
- What an internal mobility policy could include.
- Governance and Operation.

The Civil Service is committed to a policy of equal opportunities. Equal access to mobility, insofar as is practicable, should apply to all permanent general service staff up to and including the Principal Officer grade. It is recognised that it is difficult to design an internal mobility policy for professional/technical staff along the same lines as for general service staff and a flexible case-by-case approach is recommended.
Benefits of internal mobility

The following benefits can be achieved whilst maintaining the appropriate balance between individual ownership of career development and ensuring the department has a diversely experienced workforce to meet its business needs.

**Internal Mobility will assist a Department to:**

- Provide opportunities for staff members to develop their competencies.
- Maximise staff members’ competencies gained through investments made in formal education and learning and development programmes.
- Match their strategies to staffing resources.
- Optimise the existing skills, talents and productivity of the workforce.
- Reduce dependency on individual staff members.
- Reduce exposure to critical shocks when experienced or expert staff retire or leave a division.
- Introduce fresh perspectives and new thinking across the department.
- Improve knowledge sharing and cross functional working between divisions.
- Strengthen staff engagement and well-being.
- Identify the main stakeholders’ roles, responsibilities and decision making power.

**Internal Mobility will assist staff members to:**

- Develop new competencies.
- Utilise competencies gained from personal investments made through formal education and learning and development programmes.
- Strengthen promotion prospects.
- Increase ability to deliver on the department’s business plan/strategic goals.
- Gain experience through knowledge sharing swaps.
- Clarify career paths and mobility opportunities.
Guidelines for Departmental Internal Mobility

Role of the Stakeholder

Management Board

Mobility is an important element in ensuring effective workforce planning. It is essential that the Management Board identify future resourcing and skill needs which can inform mobility opportunities. These needs should match the department’s strategies. Active engagement between the Management Board, the Workforce Planning Group and the HR Manager/Mobility Officer will ensure that internal mobility is operated in an effective, open and transparent manner.

HR Division

Internal mobility is a shared responsibility of all stakeholders, however, the overall responsibility for organising and monitoring mobility lies with the HR Division. If practical for a department, consideration could be given to assigning a HR Mobility Officer to act as a focal point of contact for the department. The grade for this position to be at an appropriate senior level to report to the Management Board and/or Workforce Planning Group.

Responsibilities could include the following:

- Promote awareness of internal mobility through regular partnering with staff and management.
- Advise and support all stakeholders.
- Create and keep up to date the following forms: Application Form (sample at Appendix E); Vacancy Filling Form (sample at Appendix F).
- Develop and maintain an internal mobility database.
- Review vacancies and suitable applicants and submit to the Workforce Planning Group/Management Board at regular periods.
- Where no suitable staff member is available from database, seek alternative arrangements to fill position.
- Communicate with line managers in order to process moves in a timely manner.
- Put arrangements in place for updating all records such as PeoplePoint; Business Unit; Organisation Chart.
- Ensure consequential vacant positions are managed - releasing line manager to complete a ‘Vacancy Filling Request Form’.
- Annual survey of staff members and line managers involved in mobility requests/moves (sample questions at Appendix H) to inform policy review.
- Review policy on a recommended annual basis with a view to continually improving human resource management and meeting business needs.
- Report annually to Management Board on the implementation of the policy.
**Line Managers**

It is important that line managers offer encouragement and support in the performance and development of staff members.

**Releasing line managers should:**
- Ensure staff are fully aware of mobility opportunities for developmental purposes. Ideally this should be included in a PMDS developmental conversation.
- Ensure effective workforce planning by notifying the division head of all staff interest in internal mobility within the division.
- Complete a ‘Vacancy Filling Request Form’ where a move is due and a consequential vacancy will arise and forward to Mobility Officer/HR without delay.
- Ensure all staff members prepare and keep an up-to-date ‘Process Manual’ (see Appendix G for guidance). It is also advisable, if resources allow, for other staff in the business unit to have a general knowledge of the duties of the role.
- Communicate and actively cooperate with the Mobility Officer/HR in the implementation of mobility.
- Where a staff member is refused a move as they are considered critical to the area, succession planning and knowledge transfer measures should be implemented in order to facilitate a move within a period of not more than 12 months. This plan should be discussed in detail with staff member and communicated to the Mobility Officer/HR.
- Ensure that relevant stages of PMDS are up-to-date for staff member.

**Receiving line managers should:**
- Actively cooperate with the Mobility Officer/HR to provide for a smooth and timely transfer.
- Make the necessary arrangements for the staff member – ensure working tools are ready such as office space, telephone, and computer equipment.
- Provide ‘Process Manual’ and outline training opportunities.
- Discuss and agree PMDS Goal Setting.

**Staff Members**

It is important that staff members reflect and take full responsibility for their own career development. If interested in mobility they should:

- Discuss and outline their motivation for mobility including the benefit they expect to receive from the process with their line manager. Ideally this should be included in their PMDS developmental conversation.
- Complete and submit an ‘Internal Mobility Application Form’.
- Note that by being registered for internal mobility does not guarantee that they will be moved or that they will be offered a position in any of their preferred skill development areas.
- Send any updates to Mobility Officer/HR they wish included in their Application such as any new training/skills acquired.
- Prepare and complete a ‘Process Manual’.
Internal mobility defines any significant change to a staff member’s position which could include changing job role:description while remaining in the same business division; or moving from one business division to another. An internal mobility scheme will only include staff mobility within a single location and **does not** facilitate staff mobility between different locations or departments. This form of mobility will be facilitated by the Service Wide Mobility Scheme.

The following are examples of opportunities that could be included in an internal mobility policy, depending on a department’s business needs:

(a) **Application of Interest in Mobility**
Staff members should, in the first instance, discuss mobility opportunities with their line manager through their regular PMDS developmental conversations. If interested in mobility a staff member should complete and submit an ‘Internal Mobility Application Form’, indicating the reason for the request and the type of work/skills they would like to develop. A maximum of 4 preference is advised. This application should be endorsed by their line manager and noted by the Principal Officer/Head of Division for effective workforce planning and be forwarded to the Mobility Officer/HR for processing.

(b) **Advertised Positions**
Where particular skills are required for a position and/or there are no suitable applicants for internal mobility on the internal mobility database, the Mobility Officer/HR may wish to advertise the position internally seeking applications for the position. Clear indications of selection process should be included e.g. assessment short-listing; interview, etc.

(c) **Department Driven**
The policy should not impact on management’s right to assign staff members to roles as required throughout the year to meet urgent business needs/the development needs of a staff member. In such cases, management should work closely with Mobility Officer/HR to ensure appropriate arrangements are put in place e.g. notification of the move for recording purposes, training, etc.

(d) **Mobility within Divisions**
Division Heads should reserve the right to move staff to suitable roles within their division. In such cases, management should work closely with Mobility Officer/HR to ensure appropriate arrangements are put in place e.g. notification of the move for recording purposes, training, etc.

(e) **Knowledge sharing swaps**
Inter-divisional knowledge-sharing swaps should be encouraged. This could occur on a cross-divisional basis where management agree to swap staff members to facilitate knowledge exchange, workflows etc. In such cases there are no vacancies to fill as the process involves exchanging staff members. Management should work closely with Mobility Officer/HR to ensure appropriate arrangements are in place e.g. notification of the move for recording purposes, training, etc.
1. Staff members should be required to acknowledge that they remain interested in their mobility request on 1 January each year. Where this is not completed by 1 March of that year the staff member’s application should be withdrawn.

2. Staff moves should occur at regular intervals to ensure that there is a gradual turnover of staff and continuity within a division. The times for moving staff could, for example, be integrated into the PMDS cycle. Staff changes can occur at any time if considered necessary for the proper functioning of the department or for the benefit of the staff member.

3. To avoid excessive turnover of staff, the pace of mobility should take account of general turnover within divisions.

4. The scheme should adopt a two-pronged approach to mobility:
   a. After up to 2-3 years in a role (grade dependent), a staff member may register interest in internal mobility.
   b. After 4-5 years in a role (grade dependent), staff members can be automatically considered for internal mobility.

5. Staff members whom have:
   a. not yet successfully completed probation;
   b. a PMDS rating of “Unsatisfactory”;
   c. an incomplete PMDS for previous year;
   d. sick leave of 56 days or more or 25 instances or more over a 4 year period (or pro rata); and/or
   e. an open disciplinary issue

   may be refused mobility opportunities. In such circumstances, mobility will not take place unless there is explicit agreement between HR and the Heads of both business units.

6. Every effort should be made to find a suitable placement for all applicants, however, being registered for internal mobility does not guarantee that a staff member will be moved or that their preferences will be matched.

7. If a staff member is refused a move as they are considered critical to the area, succession planning and knowledge transfer measures should be implemented in order to facilitate the move within a period of not more than 12 months. This should be discussed in detail with the staff member and communicated to the Mobility Officer/HR.

8. In general staff members should receive a minimum of two weeks’ notice of a move. However, in urgent or critical instances this may not be practical.

9. In general, staff members should be released within a four week period.
10. The mobility scheme should not impact on the right of senior management to assign staff members to roles as required throughout the year in response to business/personal needs.

11. Mobility should not be pursued in a purely mechanical way. It should be recognised that in some instances it is more beneficial for certain staff members to stay in their current area as long as they are effective and can continue to learn and develop new skills.

12. Investment made by the business unit through a formal education programme or significant specialised training should be taken into consideration when determining the timing of a move.

13. Every effort should be made to retain work share patterns, however, staff members may be required to vary their arrangements, including resumption to full-time work, in light of the business needs of the new business unit.

14. The particular individual circumstances of the staff member should be taken into account, e.g. the onset of maternity leave or retirement may involve the postponement or cancellation of internal mobility.

15. Staff returning from prolonged or special leave, such as long term sick leave; secondments; career breaks etc. should be placed into vacant positions on their return without the need for the position to be advertised.

16. Where a suitable match is not established, following a search of the Internal Mobility database and advertisement for the position, alternative arrangements for filling position should be considered.

17. The operation of the internal mobility policy should be reviewed on an annual basis for its effectiveness with a view to continually improving human resource management and meeting business needs.
Internal Mobility Policies [extract from CSMB Scoping Paper on Action 15]

It is proposed that a commitment be made that all Departments and Offices must develop and publish an internal mobility policy in line with the guiding principles.

Internal mobility schemes can vary in their duration, arrangements, and operation. Departments/Offices can determine the mandatory nature and frequency of mobility within their Organisation. Individual policies/schemes should be tailored to meet the needs of Departments/Offices and their staff. Internal mobility should be considered in the first instance to ensure business continuity within the organisation prior to consideration of an interdepartmental move.

It is intended that a guiding template/framework based on good practice will be prepared by May 2016 to assist Departments/Offices in developing their internal mobility policy. The template will provide direction on what should be included in an internal policy such as governance aspects (e.g. monitoring, compliance, etc), role of stakeholders (e.g. HR manager, releasing manager, receiving manager, civil servant, etc) as well as administration and operation of the scheme (e.g. how to apply, eligibility criteria, selection process, frequency of mobility, etc).
Approved Guiding Principles for Internal Civil Service Mobility Policies

1. The Civil Service Management Board have agreed the following principles as a guide for the development of any internal mobility policy for the Civil Service. The policy must take account of existing business needs with clear links to the HR Strategic Agenda, Workforce Planning and Learning and Development. Mobility initiatives should be driven by the need to:
   - Enhance an organisation’s workforce capability in a cost effective way; and
   - Support and enhance career development of staff.

2. Mobility initiatives should be open, fair and transparent.

3. Investment made through Learning and Development programme will be taken into consideration when determining frequency of mobility.

4. Staff mobility schemes may vary in their duration, arrangements, and operation, and should be tailored to meet the needs of the organisation and its staff.

5. All internal, mobility should have regard to organisational demands and the need to maintain business continuity.

6. Staff who have unsatisfactory performance; sick leave and/or an open disciplinary issue may be refused mobility opportunities until sufficient improvements are made.

7. Mobility initiatives should be regularly reviewed for their effectiveness with a view to continually improving human resource management and meeting business needs.
Current inter-departmental lateral mobility mechanisms

Redeployment Panel
Arrangements agreed under the Croke Park and Haddington Road Agreements for surplus staff across the civil and public service. Reployment takes precedence over recruitment, transfers and promotions except where special skills are required or other major constraints apply.

Central Transfer List (CTL)\(^1\)
These lists are operated by individual Departments for COs and SOs. A formal General Council agreement with the CPSU (and IMPACT equivalent grades) is in place to facilitate CO and SO transfers to other locations.

Central Application Facility (CAF)\(^1\)
Panels remain in place following the closure of the decentralisation programme in 2011.

Secondment
Arrangements are in place. Staff moves take place on a temporary basis in response to an identified business or development need.

Head-to-Head\(^2\)
These moves are dealt with on a case by case basis and agreed between relevant Personnel Officers.

Expressions of Interest
These arrangements are currently suspended due to issues with backfilling of vacancies through promotion in the sending Department.

Senior Public Service Mobility
This initiative provides an opportunity for Assistant Secretaries across the Civil service to move laterally into positions that can further support the delivery on priorities set out in the Programme for Government, Public Service Reform Plan and Civil Service Renewal Plan. The Mobility Protocol was agreed by the SPS Management Committee in 2012. The process is overseen by the mobility subgroup which comprises Secretaries General of the Department of Public Expenditure & Reform (Chair), the Department of the Taoiseach and the Department of Social Protection.

Principal Officer Mobility Scheme
This programme was launched in July 2015 to provide a flexible system of managed lateral inter-departmental mobility at PO level. This Scheme provides a framework within which mobility at Principal Officer level can be facilitated and managed.

\(^{1}\) To be subsumed into the Service Wide Mobility Scheme – expected launch mid-2017.
\(^{2}\) Currently under discussion with Staff Side
Overcoming Challenges

The wide range of responsibilities and activities across the Civil Service present both challenges and opportunities for all departments. A well-managed internal mobility policy will provide significant opportunities for staff members to develop a wide range of experiences and skills, thus preventing a dependency on individual staff members in specific roles and for departments to shape a multi-skilled workforce.

The Guidelines for Internal Mobility aim to remove the following obstacles/challenges that some departments have had in implementing an effective internal mobility policy:

- **Culture and Support from Senior Management** - Lack of buy-in from senior management which can have a knock on effect across a department.

  **Resolution:** There should be a clear link between a department’s Management Board, Workforce Planning Group, and HR Manager/Mobility Officer in order to align vacancies with suitable candidates (Internal Mobility Database, Advertised Positions etc.). Regular communication and discussions about mobility and a commitment from senior management to engage in the process are paramount for the successful implementation of the policy.

- **Concerns over Brain-Drain in a Division** - Division Heads/Line Managers will inevitably seek to hold on to high performing staff members and will only release staff when they are satisfied that the replacement offered is of equal ability.

  **Resolution:** Where a staff member is refused a move as they are considered critical to the area, succession planning and knowledge transfer measures should be implemented in order to facilitate a move within a period of not more than 12 months. This should be discussed in detail with the staff member and communicated to the HR Mobility Officer.

Management should be able to anticipate and prepare for staff mobility by developing a culture that supports the ongoing transfer of knowledge for example, the practice of using a ‘Process Manual’ in order to transfer knowledge and guide training needs to ensure consistency and continuity. It is also advisable that other staff in the business unit have a general knowledge of the work carried out.

- **Dependency on individual Staff Members** – Some staff members can become ‘pigeon holed’ in an area of work causing a negative effect on their developmental and promotional opportunities. This can also discourage motivation, initiation and innovation and can lead to a bad working morale in a division.

  **Resolution:** Staff members should reflect and take full responsibility for their own career development to avoid becoming typecast. Regular development conversations should take place with line managers where staff members can express concerns and line managers can discuss opportunities to include mobility and learning and development.
Departments should develop a culture of moving staff at regular intervals to ensure that there is a gradual turnover of staff and continuity within a division. The times for moving staff could, for example, be integrated into the PMDS cycle. At a minimum, moves should be considered twice a year, however, staff changes could occur at any time if considered necessary for the proper functioning of the department or for the benefit of the staff member. To avoid excessive turnover of staff, the pace of mobility should take account of general turnover within departments and in particular grades and divisions of departments.

It is advisable that a mobility policy adopts a two-pronged approach to mobility:

- After up to 2-3 years in a role* (grade dependent), a staff member may register interest in internal mobility;
- After 4-5 years in a role* (grade dependent), staff members will automatically be considered for internal mobility.

**Culture of moving underperforming staff members** – Underperforming staff members may be released more often than high performing staff members.

**Resolution**: Staff members with unsatisfactory performance, sick leave and/or an open disciplinary issue may be refused mobility opportunities unless there is explicit agreement between both Division Heads and HR. It is advisable in this situation to have a development plan in place. Internal mobility should be promoted as a tool for high performers who actively contribute to the department and who are willing and eager to support the department in achieving its strategic objectives.

**Backfilling** - Problems encountered with backfilling vacant positions.

**Resolution**: It should be a priority for a department in the first instance to utilise internal mobility mechanisms to fill vacancies (Internal Mobility database and advertisement for the position), however, where a suitable match is not established alternative arrangements should be considered.

**Reluctance for Change** - Resistance by staff members to mobility can sometimes be caused by a fear of personal and/or work adjustment and/or commuting difficulties if new office within a location is in a different area. This can cause low staff morale and a bad working atmosphere.

**Resolution**: Mobility should form part of developmental discussions under the PMDS process and staff members should have the opportunity to express any concerns they may have about mobility. Management will also gain a better understanding of their staff members’ concerns and should offer encouragement and support.

Mobility should not become forced or mechanical. It should be recognised that in some instances it may be more beneficial for certain staff members to stay in their current area as long as they are effective and can continue to learn and develop new skills.
Guidelines for Departmental Internal Mobility

- **Mismatched Positions** – Skills/interests are not taken into consideration in mobility.

  **Resolution**: Staff members should be pro-active in exploring the developmental opportunities and future career paths in the Organisation. This could be achieved by making contact with others (management, HR, peers, mentors, colleagues from their own network) to learn about their career experiences. These conversations will not only inform them of the details of a certain job or career path, but also what it takes to succeed in the role. This informal exploration of options can be useful in advance of applying for mobility, to inform the staff member of the type of work/skills they may be interested in alongside their preferred Section/Division.

  Mobility should be viewed as a tool to improve a staff member’s diversity of experience and provide challenging development opportunities. Staff members should be made aware that it is not always practical to accommodate their preferences.

- **Formal education funded by division** – Staff member not allowed to avail of mobility due to substantial investment made through a formal education programme or intensive training.

  **Resolution**: When a staff member engages in either a formal education programme funded by division or extensive training a discussion should take place with line manager outlining the expected commitment to the division e.g. timing before being eligible for mobility. This should be determined by individual departments.

- **Professional/Technical Staff Members** - Limited reassignment opportunities for this category of staff.

  **Resolution**: It is recognised that filling professional/technical positions can prove difficult and therefore the possibility of internal mobility is likely to be limited. It is also difficult to find a balance between the need to offer mobility for career development to all civil servants and the costs (recruitment, learning and development, formal education programme etc.) which incur in order to replace professional/technical staff members who move to a more general position. Also, the staff member concerned will not always want to leave his/her area of expertise.

  Departments that have a large number of professional/technical positions could possibly set up their own arrangements for cross-mobility or rotation to facilitate mobility among their staff members e.g. work with another team or with an adjusted range of duties. However, a greater difficulty arises in departments where there are few or individual professional/technical positions.

  For these reasons, it is difficult to design an internal mobility policy that deals with professional/technical positions along the same lines as for generalist positions and a more flexible case-by-case approach is therefore recommended.
### SECTION 1 – PERSONAL DETAILS

<table>
<thead>
<tr>
<th>Name</th>
<th>PPSN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Work Phone Number</td>
</tr>
</tbody>
</table>

### SECTION 2 – CURRENT POSITION DETAILS

<table>
<thead>
<tr>
<th>Current Position</th>
<th>Current Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time in Current Position</td>
<td>Grade</td>
</tr>
</tbody>
</table>

### SECTION 3 – CURRENT EMPLOYMENT STATUS

- Full-Time [ ]  Part-Time [ ]  Work-sharing Pattern if Part-Time

Please indicate any approved term-time or special leave plans you have for the current year:

### SECTION 4 – Transfer Request Rationale

Please provide a brief description of why you are requesting a transfer.
APPLICATION FOR INTERNAL MOBILITY – Page 2

SECTION 5 – PREFERENCES

Note: Applicants should indicate the type of work/skills he or she would like to develop, including the appropriate division.

In order of preference, please indicate the type of work/skills you are interested in alongside your preferred Section/Division if appropriate.

NOTE: It is not always possible to accommodate preferences.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Type of Work/Skill Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

SECTION 6 – SKILLS AND EXPERIENCE

What skills and experience do you currently have?

SECTION 7 – KNOWLEDGE TRANSFER

Do you have a working Process Manual in Place?  
Yes ☐  No ☐

If no, what plans are in place to develop a Process Manual?
SECTION 8 – MANAGER’S COMMENT AND APPROVAL (GRADE LEVEL OF HEO OR ABOVE)

Please comment on any matter you deem relevant to this staff member’s application for internal mobility.

I have discussed the completion of a Process Manual with the applicant and ensured they understood their responsibilities in completing the Manual.

Yes ☐ No ☐

I support and approve this application for the Mobility Scheme.

Yes ☐ No ☐

Yes, but not immediately. I suggest this timeframe for mobility ________________

If ‘no’ or ‘not immediately’, please give your reasoning why this application cannot be approved at this time and plans in place to support application in the future:

Has this been discussed in detail with the applicant?

Yes ☐ No ☐
SECTION 9 – APPLICANTS SIGNATURE

I understand that while every effort is made to match my preferences this is not always possible.

I hereby submit my application for consideration for any mobility opportunities which arise as part of the Internal Mobility Scheme.

Signature

Date

Printed Name

SECTION 10 – MANAGERS SIGNATURE AND DIVISION ACKNOWLEDGEMENT

Manager Signature

Date

Printed Name

Date

Principal Officer / Division Head Signature
## Vacancy Filling Request Form – Page 1

*To assist HR units in filling vacancies that arise.*

### SECTION 1 – VACANCY DETAILS

<table>
<thead>
<tr>
<th>Position Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade:</td>
</tr>
<tr>
<td>Section/Division:</td>
</tr>
<tr>
<td>Reason for Vacancy:</td>
</tr>
</tbody>
</table>

### SECTION 2 – WORK OF THE AREA AND ROLE DESCRIPTION

*Please note that information given in this section will be used to form the basis for any advertisement of the vacancy.*

<table>
<thead>
<tr>
<th>Describe the work of the section:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Description:</td>
</tr>
<tr>
<td>To whom does this Staff Member report?:</td>
</tr>
<tr>
<td>Who reports to the Staff Member? (Numbers and Grade):</td>
</tr>
</tbody>
</table>

Please indicate the following in relation to the role:

- Full-Time  ☐  Workshare  ☐
- Permanent ☐  Temporary  ☐

If temporary, please indicate length of contract: ______________________

If part-time, please indicate work share pattern: ______________________

Project Post: ________________________________________________________
SECTION 3 – PERSONAL REQUIREMENTS/RECOMMENDATIONS

Competencies required (these should be linked to defined competencies for the grade as identified under PMDS):

Are there any specific skills required – e.g. technology/software knowledge, specific educational requirements?

SECTION 4 – Authorisation

I approve the filling of the above position and confirm that the post is essential for the efficient and effective performance of the Department’s functions and that the costs involved can be met from the division’s delegated sanction. I note that it is not always possible to fill positions as they become vacant and business needs will be considered.

Is this request within the delegated budget for division?

Yes ☐ No ☐

Principal Officer Signature: __________________________
Principal Officer Printed Name: _________________________
Assistant Secretary/ Division Head Signature (for noting): __________________________
Date: __________________________

PLEASE SUBMIT THIS FORM TO MOBILITY OFFICER/HR FOR CONSIDERATION
Outline for creating a ‘Process Manual’

It is crucial that a Process Manual is kept up-to-date in order to transfer knowledge and guide training needs to ensure consistency and continuity.

1) **Section Background / Policy Context**
   - Role of section and main outputs.
   - Underpinning policies and legislation which govern the work.

2) **Key Stakeholders**
   - Up to date contact details of internal and external stakeholders

3) **File Location**
   - List of files with details of location – both paper and electronic

4) **Useful information**
   - Explanation of acronyms and abbreviations commonly used.
   - Useful websites. Where section has a web presence, details of staff member who manages the content.
   - Key documents or extracts which will help achieve deadlines.

5) **Key learning and tasks for the position**
   - Key essential learning elements (either specific to job or more general) and appropriate way to learn them.
   - Software packages used.
   - List of main tasks for the role – to provide purpose and expected outturn for each.
   - List of steps required to complete each task in a timely manner.
   - Timeframe for completing essential tasks.
   - Key stakeholders involved in process – input and output.
Suggestions for Interview/Survey Questions

Staff member

- Did you discuss mobility with your line manager as part of the PMDS process?
- Was this a positive experience? If Not, Why?
- Can you provide suggestions to how this part of the process can be approved?
- What difficulties, if any, did you encounter in availing of the mobility opportunity?
- How long did you have to wait until your move was arranged?
- How long were you in your previous division?
- How many different areas of your previous division have you been assigned to at your current grade?
- Do you feel this new role will provide a good match for your skills?
- Will this role give you the opportunity to develop your desired skills and experience?
- Did you complete a Process Manual?
- Was this discussed with your line manager?
- Have you ever refused an offer of mobility? If yes, Why?
- How many years do you feel a staff member at your grade should stay in any one assignment?
- Are you aware of knowledge sharing taking place in your division/department?
- Do you feel knowledge was specialised with a few individuals in your previous division?
- Can you suggest any improvements to how the current internal mobility scheme is run by the department?
- Do you agree with a formal staff mobility policy? Give reasons why?
Line Managers

Releasing line-manager:

- Are mobility opportunities included in regular developmental conversations with staff members throughout the PMDS process?
- Did you ensure the head of division was aware of staff member’s interest in internal mobility?
- Did you complete a ‘Vacancy Filling Request Form’ when you were aware of the imminent move and forward it to HR Division without any unnecessary delay?
- Did the staff member complete a ‘Process Manual’ before they vacated their position?
- Did you clearly explain to the staff member the purpose of the ‘Process Manual’?
- Did you actively cooperate and liaise with the mobility officer in the implementation of mobility to ensure that the staff member was released within a 4 week period?
- What kind of arrangements have been made to backfill the vacant position?
- Has the End-Year PMDS form been completed and signed off for the staff member?
- Can you suggest any improvements to how the current mobility scheme is run by the department?

Receiving line-manager:

- What arrangements did you make to provide for a smooth and timely transfer?
- What pre-arrival arrangements did you make to secure working tools (office space, telephone, and computer equipment) for the staff member?
- Did you appoint a member of your team to assist the staff member in adjusting to the new working environment and to provide any necessary coaching?
- Was the staff member given a copy of a completed ‘Process Manual’?
- Did you discuss and agree performance goals which are linked to the business plan/strategic goals of the section and department with the staff member?
- Did you identify appropriate learning and development opportunities (informal and/or formal) and discuss and agree a learning and development plan for the staff member in order to develop the required skills for the position?
- Can you suggest any improvements to how the current mobility scheme is run by the department?