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Education Procedure Manual 2/33

Procedures for Transfer of Teachers

Passed at EDC Local Negotiating Committee for Teachers (LNCT) -

17 March 2016

De minimis changes approved at EDC LNCT

16 June 2016

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Monitoring and Review

This procedure manual will be reviewed in accordance with:

- Legislative change
- Changes to SNCT national conditions of service
- Other external factors
- Feedback on the effectiveness of the policy
- Requests for review by Elected Members, Trade unions and/or Management.

Alternative Formats

All Education Procedure Manuals can be found on The Hub and East Dunbartonshire Council's website. The Procedure Manual and the associated Appendices can also be made available, on request, in a variety of formats. These can be requested from the Customer Services and Transformation team by contacting 0141 578 8471. Information will be made available in accordance with the Council's Accessible Information Policy.

1.0 INTRODUCTION

- 1.1 This Procedure Manual provides a mechanism whereby teachers may be transferred from one educational establishment to another. It covers three types of transfer:
 - 1.1.1 Voluntary transfer arising from a surplus situation
Where a teacher volunteers to be the teacher identified as 'surplus'.
 - 1.1.2 Compulsory Transfer arising from a surplus situation
Where there is no volunteer identified as the 'surplus' teacher, the teacher identified by the authority as surplus (normally through length of continuous service) will be transferred compulsorily.
 - 1.1.3 Voluntary Transfer not arising from a surplus situation
Where a teacher requests a transfer for reasons other than a surplus situation.
- 1.2 The procedures detailed in this paper apply to all employees on Scottish Negotiating Committee for Teachers (SNCT) Conditions of Service.
- 1.3 The term 'teachers' will be used throughout this Procedure Manual to refer to all employees on SNCT Conditions of Service.
- 1.4 Teachers who are dual qualified are covered under the compulsory transfer procedures and can be declared as surplus.
- 1.5 Specific arrangements for the management of surplus promoted teachers are detailed in Section 6.0.
- 1.6 Where a surplus in staffing has arisen due to school closures, new school openings, amalgamations, management reorganisations etc the procedures for appointments will be detailed in a supplementary paper, as agreed through LNCT. The procedures detailed in this paper will apply if it is necessary to transfer a surplus teacher following the outcome of the agreed appointments procedure.

2.0 PRINCIPLES

- 2.1 While every effort is made to minimise the number of compulsory transfers, all teachers are appointed to the service of East Dunbartonshire Council and have a contractual liability to transfer from one educational establishment to another, where this is required.
- 2.2 Although it is prudent to seek to reduce the financial impact of any surplus situation it is equally important to seek to maintain the high standards achieved in our schools and to avoid any financial penalties imposed on the authority through government requirements to maintain teacher numbers
- 2.3 The performance of a teacher is not included in the criteria which are considered under the compulsory transfer process.

- 2.4 In surplus situations, every effort will be made to seek a volunteer for transfer in the first instance.
- 2.5 At any stage of the transfer process, the teacher will have the opportunity to discuss the matter with the Head Teacher and/or the Resource Planning Manager and be accompanied by a trade union colleague if so desired.
- 2.6 Teachers will be given 4 working weeks written notice of a transfer, excluding holidays. This notice period may be adjusted subject to consultation with the Head Teachers concerned and with the agreement of the individual teacher.

3.0 IDENTIFICATION OF SURPLUS POSTS

- 3.1 Each educational establishment in East Dunbartonshire Council is staffed in accordance with the agreed staffing entitlement for the school, as determined by school roll.
- 3.2 The promoted post structure in each school is determined by the arrangements as detailed in Education Procedure Manual 2/05: Scheme for Promotion of Teachers to Posts of Responsibility in Primary Schools and Education Procedure Manual 2/06 : Scheme for Promotion of Teachers to Posts of Responsibility in Secondary Schools.
- 3.3 Posts which are surplus to the staffing entitlement and/or the promoted post structure for an individual school will be identified during the Workforce Planning Programme for schools, which commences in the January preceding the new school session in August. An outline of the Programme is attached at Appendix 1.
- 3.4 A number of factors impinge on the workforce planning process eg retirements, resignations, promotions, changes to class structures, anticipated rise or fall in the school roll. Resignations can occur at any time of the session, so, while the aim is to make arrangements for the transfer of surplus teachers into appropriate posts with effect from the start of the new session, this is not always possible. The actual identification and transfer of surplus teachers can therefore take place at any time during a session.
- 3.5 During the Workforce Planning process, the Resource Planning Manager will discuss actual or potential surplus situations with Head Teachers.
- 3.6 Normally a surplus should be declared as full days only. Where a pointage surplus has been declared, those responsible for the timetable should ensure that the identified teacher has a collapsible, but meaningful timetable.
- 3.7 The Resource Planning Manager will officially notify the Head Teachers of the schools concerned of actual or potential surplus situations and the Head Teachers will in turn convey this information to the appropriate teacher(s) at the earliest opportunity.
- 3.8 If a surplus situation arises where there is more than one teacher within a specific category (eg class teachers, Depute Head Teachers, PT Guidance etc), all teachers in the affected group will be informed by the Head Teacher.
- 3.9 Teachers, in an affected group, who are absent through illness, secondment, maternity leave, career break etc must also be informed by the Head Teacher at this stage and at all subsequent stages of the process.

4.0 IDENTIFICATION OF SURPLUS TEACHER(S)

- 4.1 All teachers in a category where a surplus has been identified will be consulted by the Head Teacher to ascertain whether there is a volunteer for transfer.
- 4.2 Teachers who volunteer in a surplus situation will undergo the same process and be accorded the same rights under these Procedures as compulsorily transferred teachers.
- 4.3 If more teachers volunteer than is needed, the teacher with the most service from the volunteer group should be offered the transfer.
- 4.4 Once the voluntary request for transfer has been accepted by the Head Teacher and the surplus teacher identified formally by the Resource Planning Manager, the surplus teacher can no-longer opt out of the transfer procedure.
- 4.5 If there is no such volunteer, the Resource Planning Manager will confirm the teacher identified as surplus, in accordance with the criteria outlined in the following paragraphs.
- 4.6 Any teacher who is on a Permanent Supply Pool (PSP) contract and has not gained substantive rights to the school will be required to move, as per their contractual status, should a surplus be identified.
- 4.7 If there is more than one teacher on a PSP contract in the group affected, then the teacher with the least service would be transferred.
- 4.8 A pregnant teacher, a teacher on maternity leave, paternity leave, adoption leave or a career break should not be liable to compulsory transfer.
- 4.9 On return from maternity/paternity/adoption leave/career break, a teacher will be covered under these compulsory transfer procedures.
- 4.10 A teacher who is undertaking a phased retirement or winding down and is in the final year of a declared retirement will not be subject to compulsory transfer.
- 4.11 Where a teacher is in an acting position ie temporarily promoted from their substantive main grade teaching post, they will still be subject to these procedures where a surplus has been identified in relation to their substantive post.
- 4.12 Where a teacher undergoing the competency process is identified as the surplus teacher to be transferred, consideration would be given to the most appropriate time for the transfer to take place to ensure continuity of support.
- 4.13 Normally the teacher with the least continuous service in the category of post, where there is an identified surplus, should be required to transfer unless there are, in the view of the Resource Planning Manager, justifiable reasons for deciding otherwise.
- 4.13.1 Continuous East Dunbartonshire Council service will also include continuous service transferred directly from Strathclyde Regional Council and service covered by the Local Authorities (Teachers Transfer) (Scotland) Order 1995. This means that a teacher transferring from Strathclyde Regional Council directly to East Dunbartonshire Council at local government reorganisation in 1996 will have continuous service with SRC counted as continuous service with East Dunbartonshire

Council. A teacher transferring from SRC to another successor Council (within the area covered by the former SRC Council) and then transferring or being appointed to a post with East Dunbartonshire Council prior to 1 April 1997 will have continuous service with SRC and with the successor Council counted as continuous service with East Dunbartonshire Council, provided there has been no break in service.

- 4.13.2 Teachers whose first employment with East Dunbartonshire Council commences after 1 April 1997 will be deemed to have continuous service with the Council from the date of commencement of employment where employment with East Dunbartonshire Council thereafter is continuous.
- 4.13.3 The undernoted, while not counting as reckonable service, will not be regarded as constituting breaks in service for the purposes of determining liability to transfer in a situation of surplus.
- (i) school holiday periods between contracts,
 - (ii) lapses of employment of no more than 10 working days,
 - (iii) lapses of employment falling within the period from the start of the session up to but not including the first working day after 31 August,
 - (iv) career breaks
- 4.13.4 Periods of unpaid maternity/paternity/adoption leave not exceeding 1 year will not be regarded as constituting breaks in service and will be counted as service for the purposes of compulsory transfer.
- 4.13.5 On an employee's return from a career break their separate periods of employment (ie before the career break and after the career break) will be treated as continuous for statutory and contractual purposes. The period of the career break is not a period of employment and will not count towards reckonable service.
- 4.13.6 Periods out of service taken solely for the purpose of child rearing or the full-time care needs of an immediately dependent relation for a period not exceeding 7 years will not be regarded as a break in service. Indeed such periods out of service shall count as the equivalent of teaching service for the purpose of identifying a teacher as surplus to the establishment of a particular school. It will be possible to count more than one period out of service. i.e., for child rearing purposes/the full-time care needs of an immediately dependent relation, as service but the total amount of time out of service to be counted must not exceed an aggregate of 7 years.
- 4.13.7 Part-time service end-on to full time service will be credited on a full time equivalent basis for the calculation of total continuous service with East Dunbartonshire Council and its antecedent authorities.
- 4.13.8 Where the calculation of continuous service in the appropriate category of post produces identical results for two or more teachers then regard would be had to total aggregate service with East Dunbartonshire Council or antecedent SRC authorities, disregarding all breaks in service between contracts.
- 4.13.9 Where this further calculation fails to resolve the issue then the teacher to be compulsory transferred will be chosen by the drawing of lots in the presence of the teachers concerned.

- 4.13.10 Any issues regarding continuous employment should be raised in the first instance with the Resource Planning Manager and/or the teacher's professional association.
- 4.14 Job-sharers enjoy employment rights relating to their own employment rather than to the post in which they are employed. Consequently, and for the purposes of this agreement, the service of job-sharers will be calculated on an individual basis. In the event of one or other or both job sharers being considered by the Resource Planning Manager as being surplus to requirements, job share partners may be offered one of the following;
- (i) a permanent part-time position,
 - (ii) a permanent full time position
 - (iii) an alternative job share position

5.0 PROCEDURE FOR THE TRANSFER OF A SURPLUS TEACHER

- 5.1 Individual teacher(s) who have been identified as surplus will be informed by the Head Teacher. This will be confirmed in a formal letter from the Resource Planning Manager, intimating the decision to transfer and the reasons for it (see Standard Letter, attached at Appendix 2). A copy of this Procedure Manual and details of all known relevant vacancies will also be enclosed with the letter.
- 5.2 A meeting with the teacher and the Resource Planning Manager will be arranged in order to discuss the options which are open to the teacher. The teacher may be accompanied at this meeting by a trade union colleague, if so desired.
- 5.3 The teacher may visit the schools in which there are relevant vacancies.
- 5.4 The teacher will be asked to rank the vacancies in order of preference (where more than one appropriate vacancy exists) and, where possible, the teacher's preferences will be taken into account.
- 5.5 Although the Authority reserves the right to transfer compulsorily, the Resource Planning Manager will recognise justifiable requests by surplus teachers in non-denominational schools not to transfer to a denominational school.
- 5.6 Where a surplus teacher opts to transfer to a denominational vacancy, this will be subject to gaining church approval. If this approval is refused, the teacher will be required to choose an appropriate non-denominational vacancy from those available.
- 5.7 Where more than one teacher is to be transferred and more than one vacancy exists, all other things being equal, the teacher with longest continuous service will be given first opportunity regarding their ranked preference order.
- 5.8 Where more than one teacher is surplus and only one vacancy exists, then all other things being equal, the teacher with the least continuous service will be subject to transfer.
- 5.9 The teacher will receive written notification if the need to transfer ceases.
- 5.10 Teachers will be given 4 weeks written notice of a transfer excluding holidays of date of transfer. This notice period may be adjusted subject to consultation with the Head Teachers concerned and with the agreement of the individual teacher.

- 5.11 A teacher transferred compulsorily or who volunteers as part of the compulsory procedures will not normally be transferred again within a period of two years. A teacher who has requested a voluntary transfer (ie for reasons other than a surplus situation) does not enjoy this protection and can be identified as surplus.
- 5.12 A teacher who is compulsorily transferred will have the opportunity of returning to the school from which transferred should a suitable permanent vacancy arise there within two years of the date of the original transfer. The date of return is subject to consultation between the two Head Teachers concerned. The two year protection applies from the date of the original transfer. A teacher who has requested a voluntary transfer (ie for reasons other than a surplus situation) does not enjoy this protection.
- 5.13 Arrangements should be made at establishment level to ensure continuity of teaching and learning should a teacher become subject to potential or actual transfer.
- 5.14 Where a surplus situation is identified and it is not possible to effect the transfer, the Head Teacher must ensure that the teacher who is declared surplus is afforded a collapsible, but meaningful timetable.

6.0 SPECIFIC ARRANGEMENTS FOR THE TRANSFER OF PROMOTED TEACHERS

- 6.1 Where a promoted teacher has been declared surplus, the same general procedures as detailed in section 5 of this paper will apply. Additional arrangements for promoted teachers are outlined below.
- 6.2 In cases where it is anticipated that there will be surplus promoted teachers eg as a result of school closures, new school openings, amalgamations, management restructuring etc, the specific procedures for the appointment of promoted posts and the management of surplus will be detailed in a supplementary paper, as agreed through the LNCT.
- 6.3 SNCT Letter from Joint Secretaries (JS/11/26), attached as Appendix 4, provides advice to councils on mechanisms to minimise costs in relation to conservation eg redeployment, ring fenced interviews, commensurate duties, premature retirement. The mechanisms which have been agreed through East Dunbartonshire Council's LNCT are detailed below.
- 6.4 A surplus promoted teacher will be invited to attend a meeting with the Resource Planning Manager to discuss the options which are available to the individual in a particular situation. The teacher can be accompanied by a teacher trade union colleague, if so desired.
- 6.5 The SNCT advises (JS/11/26) that, in accordance with The Scottish Schools (Parental Involvement) Act 2006 and the Parental Involvement in Head Teacher and Depute Head Teacher Appointments (Scotland) Regulations 2007, there is no statutory bar to the redeployment of promoted teachers to commensurate posts should their substantive posts cease.
- 6.6 There must be a period of consultation with the Parent Council should the redeployment of a Head Teacher or Depute Head Teacher be required. This is in accordance with Regulations 4 and 5 (3) of the Parental Involvement in Headteacher and Deputy Headteacher Appointments (Scotland) Regulations 2007.

- 6.7 While in terms of good practice, the Council will always consult with the relevant Parent Council, in a redeployment situation involving a Head Teacher or Depute Head Teacher, the Council will always have the ultimate responsibility for decision making in respect of redeployment.
- 6.8 A promoted teacher who has been declared surplus may be transferred to a suitable post of the same designation. This would normally be a post job sized at the same or lower salary.
- 6.9 The identification of a suitable post would be established on a case by case basis.
- 6.10 Where a post is at a higher salary, the teacher would be required to apply for the post.
- 6.11 The preference of the teacher to be transferred will be taken into account, but the Council reserves the right to transfer a teacher to an alternative post, subject to the exigencies of the service.
- 6.12 Where more than one teacher, in the same designation of promoted post and on the same salary, is to be transferred and more than one suitable vacancy exists, the teacher with longest continuous service will be given first opportunity to accept the transfer.
- 6.13 Salary conservation arrangements, as set out in the SNCT Handbook of Conditions of Service, at the time of transfer, will apply if the post to which the teacher is transferred is at a lower salary.
- 6.14 Where a surplus promoted teacher refuses unreasonably on two occasions to accept an alternative, equivalent or better post, there shall be no entitlement to conservation of salary.
- 6.15 Where there is no immediate suitable permanent post available, the promoted teacher could be allocated to a temporary placement until a suitable substantive position is available.
- 6.16 Temporary transfers of promoted teachers can take place for very good management and educational reasons, such as
- cover for long term absence;
 - providing additional support to another school;
 - continuous professional development for individuals
 - secondments
- 6.17 A promoted teacher employed in a temporary post should have duties commensurate with his/her current salary.
- 6.18 Should a suitable permanent vacancy arise during the course of the temporary placement, a decision on whether to allow the teacher to complete the temporary placement before being transferred to new post will be discussed and a decision made by the Resource Planning Manager.
- 6.19 All surplus teachers can apply for other promoted posts in the normal way. Support can be provided to assist teachers with report writing and interview techniques.
- 6.20 A promoted teacher who has been declared surplus is guaranteed inclusion, on application, on the long list of same designation vacancies. This provision commences from the date at which the teacher becomes surplus and will last for the duration of the salary conservation period.

- 6.21 If no relevant vacancy exists, the promoted teacher may stay in their current school as a maingrade teacher but with agreed duties commensurate with the salary on which the teacher is conserved. These must be capable of being carried out within the 35 hour working week. In these circumstances the teacher would remain liable to transfer in the event of a suitable vacancy arising.
- 6.22 In some circumstances it may be possible to consider commensurate duties across schools or at Council level.
- 6.23 Any commensurate duties will not extend beyond a period of salary conservation. At the end of the conservation period, the teacher will be paid at the top of the maingrade scale.
- 6.24 A promoted teacher who has been declared surplus may opt to demit their promoted post and assume a post of maingrade teacher. In this case, the teacher would no longer have any management responsibilities and would not be entitled to conservation of salary.
- 6.25 A teacher who demits from their promoted post will be placed in a school where there is a suitable vacancy.
- 6.26 Consideration may be given to a limited number of early retirements, as per SPPA eligibility, with an appropriate enhancement of service, in relation to all surplus staff identified as a result of the school closures. This will be restricted according to the value of any budget that may be made available for this exercise and due consideration will be given to any saving that can be accrued to offset the on-going retirement costs to the Council.
- 6.27 If, by the end of their period of salary conservation surplus promoted teachers have been unsuccessful in securing a promoted post within East Dunbartonshire Council, they will be deemed to be a maingrade teacher and paid at the top of the maingrade scale. At this point they will have no further priority rights for any promoted vacancy within East Dunbartonshire Council.
- 6.28 The Head Teacher will reassign the management responsibilities of a promoted teacher, who has been declared surplus, to another promoted teacher. This reassignment will take place from the date when the teacher has been declared surplus.
- 6.29 Where the transfer of a promoted teacher results in insufficient teaching time within the school's staffing entitlement, arrangements will be made by the Resource Planning Manager to appoint a pointage teacher to the school.

7.0 VOLUNTARY TRANSFERS

- 7.1 This section of the Procedure Manual does not apply to promoted teachers.
- 7.2 In normal circumstances, where a teacher wishes to move to another school, s/he should apply for vacancies through the normal recruitment and selection process.
- 7.3 It is recognised that there may be exceptional circumstances in which it is necessary to transfer a teacher to a different school, at the instigation of the authority and/or the teacher.

- 7.4 All unpromoted teachers have the right to request a transfer to a different school; however, there is no guarantee that such requests will be granted.
- 7.5 Exceptional circumstances may relate to eg medical reasons, personal circumstances or the serious breakdown of working relationships. Travel difficulties will not normally be considered as a reason to transfer.
- 7.6 If a teacher is subject to any stage of the competency or disciplinary procedures, s/he will not be eligible to request a transfer until the procedures have been concluded.
- 7.7 A teacher requesting to transfer on medical grounds will require to discuss their condition and possible options with the Head Teacher, prior to submitting a formal application for transfer. The teacher is encouraged to invite their teacher trade union representative to such meetings. A medical report from Occupational Health will be required to substantiate the medical grounds.
- 7.8 A teacher requesting to transfer on personal grounds will require to discuss their circumstances and possible options with the Head Teacher, prior to submitting a formal application for transfer. The teacher is encouraged to invite their teacher trade union representative to such meetings. This policy is not intended to replace the right to request flexible working.
- 7.9 A teacher requesting to transfer in circumstances where there is an alleged breakdown of relationships within the school, will require to discuss, in confidence, the circumstances and possible options with the Head Teacher, prior to submitting a formal application for transfer. The teacher is encouraged to invite their teacher trade union representative to such meetings. A teacher requesting to transfer in circumstances where there is an alleged breakdown of relationship with the Head Teacher, will require to discuss, in confidence, the circumstances and possible options with the Resource Planning Manager.
- 7.9.1 Consideration will be given to the circumstances to determine if it is in the best interests of the authority and/or the teacher that a transfer be arranged.
- 7.9.2 Such transfers will only be accommodated where the exigencies of the service permit.
- 7.9.3 In such circumstances the transfer may be on a super numerary basis.
- 7.9.4 The aim would always be, in the first instance, to seek to resolve any difficulties within schools. Mediation should also be considered.
- 7.9.5 Only where an irrevocable break down in relations is considered to have occurred would a permanent transfer be considered.
- 7.10 A teacher applying for a voluntary transfer cannot specify which school they wish to be transferred to.

- 7.11 Requests to transfer should be submitted on the appropriate form (see Application: Request to Voluntary Transfer, attached at Appendix 3), together with relevant documentation and submitted to Resource Planning Service during the period 1st January – 31st January each year.
- 7.12 Applications received outwith this period will not be accepted.
- 7.13 All applications will be considered as part of the annual workforce planning exercise.
- 7.14 In considering such requests, the Resource Planning Manager will discuss the application with the teacher involved and advise the teacher, relevant teacher trade union representative and the school management of the outcome. Responsibility for making the final decision lies with the Resource Planning Manager. A decision will be made on completion of the Workforce Planning exercise.
- 7.15 The teacher will be notified of the outcome of their application in (see Standard Letter, attached at Appendix 4).
- 7.16 If the application for transfer has been successful, a new contract will be issued.
- 7.17 Where a number of teachers have applied for a transfer and fewer vacancies exist, then the teachers with the longer service will be offered the first opportunity to transfer.
- 7.18 All voluntary transfers, in accordance with section 7 of this Procedure Manual, will be effective from the start of the new school session (ie August). There will be no mid session voluntary transfers unless there are mitigating circumstances.
- 7.19 If a teacher is offered a transfer and declines it, their name will be removed from the transfer list and s/he will require to re-apply the following year, if they still wish to request a transfer.
- 7.20 A teacher who is successful in gaining transfer to another school cannot make an application for a further transfer within two years from the date of transfer.

Teacher Workforce Planning Timetable

Timescale	Action
OCTOBER - FEBRUARY	Budget setting
MID – END JANUARY	Workforce Planning forms issued to Head Teachers
END JANUARY – MID FEBRUARY	Workforce Planning forms returned to Resource Planning
FEBRUARY - MARCH	Meetings between Resource Planning and Head Teachers to discuss specific workforce planning issues eg significant increase/decrease in roll
MID – END APRIL	Confirmation to Establishments of Basic Staffing Entitlement (and Number of Classes in Primary)
APRIL - JUNE	Take Forward Issues Relating to Retirals, Redeployment, Surplus, Change to Contractual Status and Transfers.
MARCH ONWARDS	Advertise Vacant Posts (if applicable)
MID – END MAY	Probationer Allocation Notification to Schools
JUNE	Termination of Temporary Contracts
JUNE	August Appointments
AUGUST	Full Staffing Complement Operational in Schools

Standard Letter PM2/33/1 : Informing Teacher of Transfer (Unpromoted)



**CUSTOMER SERVICES &
TRANSFORMATION
RESOURCE PLANNING**
Southbank House
Southbank Business Park
Kirkintilloch
G66 1XQ

Our Ref:
If phoning or calling ask for:
Tel: 0141 578
e.mail: @eastdunbarton.gov.uk

Date:

PRIVATE & CONFIDENTIAL

**TEACHER WORKFORCE PLANNING SESSION (*Insert session*)
NOTIFICATION OF SURPLUS**

The teachers' workforce planning exercise for session (*Insert session*) has identified that there is likely to be a surplus of teachers in (*insert name of primary school or department and name of secondary school*).

Our records indicate that you have the least continuous service and therefore this letter is to advise you that you will be required to transfer to another school either from the start of session (*Insert session*) or as soon as an appropriate vacancy occurs.

I have enclosed a copy of Education Procedure Manual 2/33 : Procedures for Transfer of Teachers for your information and would draw your attention to Section 5 in particular which details the process to be followed.

I shall contact you in due course to arrange a meeting at which we can discuss the options available to you. You may wish to invite a trade union colleague to accompany you to this meeting.

Yours sincerely

**BERNIE SANDERSON
RESOURCE PLANNING MANAGER**

Education Procedure Manual 2/33
Procedures for the Transfer of Teachers

APPENDIX 2b

Standard Letter PM2/33/2 : Informing Teacher of Transfer (Promoted)



**CUSTOMER SERVICES &
TRANSFORMATION
RESOURCE PLANNING**
Southbank House
Southbank Business Park
Kirkintilloch
G66 1XQ

Our Ref:
If phoning or calling ask for:
Tel: 0141 578
e.mail: @eastdunbarton.gov.uk

Date:

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**TEACHER WORKFORCE PLANNING SESSION (*Insert session*)
NOTIFICATION OF SURPLUS**

The teachers' workforce planning exercise for session (*Insert session*) has identified that there is likely to be a surplus post of (*insert name of post*) within (*insert name of school*).

Our records indicate that you have the least continuous service in that category of post and therefore this letter is to advise you that you will be required to transfer to another school either from the start of session (*Insert session*) or as soon as an appropriate vacancy occurs.

I have enclosed a copy of Education Procedure Manual 2/33 : Procedures for Transfer of Teachers for your information and would draw your attention to Sections 5 and 6 in particular which detail the process to be followed.

I shall contact you in due course to arrange a meeting at which we can discuss the options available to you. You may wish to invite a trade union colleague to accompany you to this meeting.

Yours sincerely

**BERNIE SANDERSON
RESOURCE PLANNING MANAGER**

Application : Request for Voluntary Transfer

All applicants should read Section 7 of Education Procedure Manual 2/33 – Procedures for Transfer of Teachers.

Prior to submitting this application, you must have discussed the circumstances with the Head Teacher in the first instance. If your request is due to a breakdown in working relationship with the Head Teacher, you must have discussed the circumstances with the Resource Planning Manager. These discussions should be initiated by you and take place within a timescale to allow for submission of the application during the period 1st January – 31st January.

Name	
Present School	
Subject (if secondary)	
Length of continuous service within EDC	

Declaration by Teacher

I have already discussed my request to transfer (details overleaf) with the Head Teacher.

I have already discussed my request to transfer (details overleaf) with the Resource Planning Manager (only for requests relating to breakdown in working relationship with the Head Teacher)

I declare that the information I have given in this form is accurate.

Signature of Teacher Requesting Voluntary Transfer	
Date	

Declaration by Head Teacher/Resource Planning Manager* (*delete as appropriate)

I have discussed this application to transfer (details overleaf) with the teacher and can confirm that there are currently no grounds for any competency or disciplinary procedures being undertaken.

Signature of Head Teacher/Resource Planning Manager* (*delete as appropriate)	
Date	

Education Procedure Manual 2/33
Procedures for the Transfer of Teachers

APPENDIX 4a

Standard Letter PM2/33/3
Informing Teacher of Result of Voluntary Transfer Request (Successful)



**CUSTOMER SERVICES &
TRANSFORMATION
RESOURCE PLANNING**
Southbank House
Southbank Business Park
Kirkintilloch
G66 1XQ

Our Ref:
If phoning or calling ask for:
Tel: 0141 578
e.mail: @eastdunbarton.gov.uk

Date:

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VOLUNTARY TRANSFER REQUEST

I refer to your request to transfer from (*insert name of school*) and write to advise you that, following consideration, your application has been successful. You will be transferred to (*insert name of school*) with effect from (*insert date*).

The Head Teacher (*insert name*) will contact you, in due course, to arrange a visit to the school.

In the meantime, if you have any questions about this, please do not hesitate to contact me.

Yours sincerely

**BERNIE SANDERSON
RESOURCE PLANNING MANAGER**

Education Procedure Manual 2/33
Procedures for the Transfer of Teachers

APPENDIX 4b

Standard Letter PM2/33/4
Informing Teacher of Result of Voluntary Transfer Request (Unsuccessful)



**CUSTOMER SERVICES &
TRANSFORMATION
RESOURCE PLANNING**
Southbank House
Southbank Business Park
Kirkintilloch
G66 1XQ

Our Ref:
If phoning or calling ask for:
Tel: 0141 578
e:mail: @eastdunbarton.gov.uk

Date:

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VOLUNTARY TRANSFER REQUEST

I refer to your request to transfer from (*insert name of school*) and write to advise you that, following consideration, your application has been unsuccessful. Should you wish to discuss the reasons for this, please do not hesitate to contact me.

Yours sincerely

**BERNIE SANDERSON
RESOURCE PLANNING MANAGER**