

Relocation Allowances Policy

JSCC Approved – 5 October 2017

P&R Approved –



Relocation Allowances

1. Eligible Employees

All newly appointed employees having established and fully furnished homes of their own situated elsewhere outside West Lindsey, whose terms and conditions of service come within the purview of the NJC for Local Authorities' Services and JNC for Chief Executives and Chief Officers, provided that:

- i) Relocation is necessary for the efficient discharge of the employee's duties with the Council;
- ii) They take up residence within a guideline of twenty miles from their new place of employment/or within the district of West Lindsey.
- iii) Proof of expenditure is provided and all claims are made, based on the lowest of three competitive quotes;
- iv) Removal takes place within twelve months of taking up employment with the Council, or such longer period as the Director may approve;
- v) The employee has formally agreed to repay the whole of the sum received from the Council if they leave the Council's paid service for any reason within two years of taking up the appointment. If they leave in the third year, then reimbursement to be at the rate of the number of months of completed service;
- vi) A sum of £8,000 to meet claims under paragraphs 3(i)-(vi) set out below is not exceeded.

The manager responsible for recruitment needs to consider whether assistance with relocation expenses will be available to potential new employees. The manager will need to seek approval with regards to the budget and need for relocation. If it is agreed that relocation assistance may be available:

- The recruitment forms submitted for the job should indicate this; and
- The advert or recruitment information pack should let potential applicants know this.

It is likely that relocation will be most commonly applied to:

- Senior jobs where there have been significant recruitment difficulties; and
- Jobs which are part of a national recruitment campaign.

For further advice on eligibility for relocation please speak to Human Resources.

Before any claims can be made under the Scheme, the manager will ensure that a signed copy of the Relocation Agreement is returned and placed in the employee's personal file.

2. The Council will consider claims for expenditure under the following heads:

- i) legal, mortgage and related fees wholly and properly incurred in buying and selling a home including stamp duties and survey fees;
- ii) actual removal expenses, which means the cost of removing normal household effects to the new home, including the cost of insurance in transit, but only for one move;

- iii) in the case of a newly appointed officer, who is unable to find accommodation in the district and is, therefore, compelled to live separately from his/her family or to maintain a household elsewhere, pay a housing allowance for up to 26 weeks, together with a second class return rail fare home, once every month;
- iv) as an alternative to (iii) and at the discretion of the Director, a daily travelling allowance for a period of not more than 26 weeks and only if the Director certifies that daily travel is consistent with the officer's ability to do the job;
- v) granting two days' removal leave;
- vi) two second class return rail fares and meal allowances for the employee and his or her partner to view the area.

3. **Employees who leave the Council after receiving relocation expenses**

If an employee leaves the Council within 2 years, they will be required to reimburse the Council in full for any relocation allowances received. If the employee leaves the Council within year 3 they will be required to repay the Council based on the calculation below:

$$\frac{\text{Amount of expenses received} \times (36 - \text{completed months of service})}{36}$$

An example:

Joe receives relocation expenses of £8,000 he resigns from the council after 28 months of service, he will need to repay:

$$\frac{£8,000 \times (36-28)}{36} \quad \text{Amount to repay} = £1,777.78$$

Once the employee has completed three years employment with West Lindsey District Council no repayment is required.

4. **Discretion**

All payments under the scheme are discretionary and any differences will be decided by the Head of Paid Service or Director whose decision will be final. In special cases, variations to the scheme (but not the overall financial limit) may be approved by the Head of Paid Service or Director after consulting the Chairman of the Resources Committee.

5. **Review of Allowances**

Any revision to the scale of allowances to be discussed at the Joint Consultative Committee and a recommendation placed before the Corporate Policy and Resources Committee for determination.

Policy Statement

West Lindsey District Council has a commitment to equal opportunities. It seeks to ensure that no potential or current employee receives less favourable treatment than another on the grounds of age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.



Relocation Allowances Agreement Form

I confirm that if I terminate my employment voluntarily or am dismissed for reason of improper conduct, I will refund to the Council forthwith, the amount outstanding under the Scheme of Relocation Allowances at the date of termination as follows:-

- a) less than two years' service repayment in full
- b) completed two but less than three years service repayment proportionate to the months not served in the third year

If my services are terminated on the grounds of compulsory redundancy, permanent ill-health, retirement or death in service, no refund or financial assistance granted, will be required.

I accept that the Council will retain the amount of refund that I am due to make under the conditions governing the granting of Financial Assistance for Relocation Allowance from any monies owing to me by way of salary, emoluments or other expenses.

Name: _____

Signature: _____ Date: _____

Witness: _____ Date: _____

NB:

This form must be completed and forwarded to Human Resources before any payments under the above Scheme can be processed.

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