

RELOCATION GUIDANCE

Introduction

The relocation scheme is designed to help employees who are relocating to Herefordshire to begin their role within the council. The aim of the scheme is to provide assistance for costs incurred by employees as a direct result of their relocation. Support with relocation expenses is available to all new employees of Herefordshire Council who meet the eligibility criteria set out below.

It is a condition of the scheme that the post holder will be required to live in Herefordshire. They will be expected to take up residence as soon as possible after commencing appointment, within a maximum of 12 months although this period may be extended in exceptional circumstances by agreement with the Head of Service / Assistant Director / Director.

The relocation scheme does not apply to agency or interim workers.

Eligibility criteria

To be eligible to make claims under this scheme, the appointee must: -

- Buy or rent a home within Herefordshire, within a 20 mile radius of the contracted place of work as the crow flies

Scope

The Council will make available a maximum sum of up to £5,000 (£7,000 for appointees to Head of Service or above and up to £10,000 for Social Worker posts in the Children and Young People directorate) to contribute to the costs of relocation to Herefordshire. Expenses of up to £8,000 in total are tax-free provided they fall within the 'allowable expenses' category. Expenses of more than £8,000 in total will be subject to tax deductions in the usual way. Reimbursement of expenses in the 'excluded expenses' category cannot be claimed from the council and these costs would be borne by the employee.

Allowable costs

These include

- estate agent and solicitor's fees for the sale of the old property
- solicitor's fees for the purchase of the new property
- stamp duty
- mortgage fees
- agency fees for rented accommodation
- tenancy agreements
- survey fees
- land registry fees
- connection of utilities fees
- packing and unpacking of household goods
- fare for employee and family to relocate to new home
- removal of household goods (2 quotes required - reimbursement is on the basis of the lowest quote)
- preliminary visit(s) (at 25p per mile) to search for accommodation etc
- Initial visas, IHS and biometric cards can be reimbursed provided the following conditions:
 - the visa and IHS applications are made whilst you are outside the UK **and** either
 - you were not resident in the UK in either of the 2 tax years which ended before the tax year in which you come to the UK to work;

OR

- you have not been in the UK for any reason, at any time, in the 2 years ending on the day immediately before you come to the UK to work.

Excluded expenses

Will include;

- Rent or mortgage payments for any property, this includes deposits
- Expenditure which will increase the overall value of their home e.g. double glazing, central heating, fitted furniture
- Repairs or maintenance of the structure of their home
- Expenses relating to any sheds, outbuildings or fences
- Vet or boarding fees for family pets
- Council Tax
- The costs of disconnection/reconnection of electrical or other household appliances or any household cleaning
- Expenses for anything purchased using a payment plan or other finance agreement
- Expenses incurred without an official receipt or official proof of purchase
- The scheme is not designed to cover bridging loans.

Expenses are not payable where a member of staff elects to "commute" from an existing address for an indefinite period

The council will not accept invoices or make any advance payments. All costs must firstly be incurred by the employee in order for them to be reimbursed.

Payment of claim

To make a claim the appointee will need to complete the Reimbursement of Relocation Expenses form (RE1) and provide all of their original receipts and/or proof of purchase documents. The form must be approved by the Head of Service/Assistant Director/Director (which ever level of approval is appropriate).

Approval for payment sits with the Head of Service/Assistant Director/Director, who will check that the expenditure was appropriate and within the maximum amount.

Once authorised the form and receipts need to be sent to Employee Services for payment employeeservices@hoopleltd.co.uk

If an employee has already made a claim under this scheme, any further claims they make will only be processed up to the maximum allowance for their role. Claims will only be returned unprocessed if the form contains errors or is incomplete.

Employee's claim histories will be checked at the processing stage of each claim.

Repayment upon leaving the council

The Council will require repayment of a proportion of amounts paid under the scheme if the employee voluntarily leaves the employment of the Council within 2 years of taking up their post. Repayment will be on the basis of one twenty-fourth of the total amount for every month of the two year period not served. The employee will be required to sign their agreement of the repayment terms when claiming for reimbursement under the scheme.

If an employee voluntarily leaves employment with the council within their first 2 years of taking up the post, they must repay some (or all) of the expenses they have claimed under the scheme.

Updated June 2022

Employees leaving the council within their first 12 months of service:

- if an employee's contract is ended for any reason other than redundancy or early retirement on the grounds of efficiency of the service, they must repay all the expenses they claimed in full

Employees leaving the council with between 12 months and 2 years' service:

- if an employee's contract is ended for any reason other than redundancy or early retirement on the grounds of efficiency of the service then the total repayment will be reduced by 1/12 for each month served as an addition to their first 12 months of employment e.g. if an employee has 14 months of continuous service, the amount due to paid to the council is the total of amount of expenses claimed reduced by 2/12.

The council will deduct any amounts owed to them from the employee's salary payments throughout their notice period, up to and including their final salary payment. Any further outstanding balances after the employee has left will then be pursued in line with any other debt to the council.

Please refer to HR if you need further guidance regarding this document
hrbusinesspartnering@hoopleltd.co.uk .