

Relocation Assistance Scheme

Human Resources
Revised August 2023

DOCUMENT CONTROL

Policy

Title:	Relocation Assistance Scheme
Owner:	Human Resources

History

Version	Revision Date	Summary of Changes	Future Review Date
1.1	August 2014	Revised to ensure verification of expenses via quotes from 3 legitimate companies.	August 2019
1.2	August 2023	Routine Review	August 2028

Committee Approval

Version	Committee	Committee Date
1.0	Council Executive	

RELOCATION ASSISTANCE SCHEME

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RELOCATION ASSISTANCE SCHEME

1. INTRODUCTION

- 1.1 This scheme provides a mechanism to assist new employees with the costs associated with moving house because of taking up employment with West Lothian Council. The scheme is applicable to NEW employees of the council who live outwith a reasonable travel to work area as defined in section 2 below.
- 1.2 The scheme may also be applicable to present employees where an employee in tied accommodation must leave their home on retiral.

2. GENERAL CONDITIONS

- 2.1 Application of the scheme is discretionary. The interviewing panel in consultation with the Head of Corporate Services will give approval for the application of the scheme. The Depute Chief Executive in consultation with the Head of Corporate Services, will agree the package to be offered to a new recruit. The council reserves the right to vary the range of the package offered dependent on the new employee's circumstances.
- 2.2 The full range of allowances will normally only apply to an existing home owner who is selling and buying as a result of relocation to take up an appointment with the council.
- 2.3 Eligibility to the scheme must be confirmed within the first month of employment.
- 2.4 The home occupied prior to appointment must be outwith a reasonable 'travel to work' area. As a guide, this is normally taken to be in excess of 40 miles from the employee's new place of work. However, the Head of Corporate Services will determine the reasonableness of this in any individual case according to the particular facilities available between the work location and the employee's existing home location.
- 2.5 The employee's new home should be within the council's boundaries or no more than ten miles from this boundary. In any event, the Depute Chief Executive must be satisfied that the employee's new home location will not give rise to operational problems and that it will ensure the employee is available when required to carry out the duties of the post.

- 2.6 If a member of staff leaves the council's service within 2 years of the date of appointment, they will reimburse the council the full amount paid in respect of relocation assistance. Outstanding sums will be repaid on the employee's last working day and the employee will sign an authorisation to enable the council to offset any final payment of salary, holiday pay or other monies due against the sum owed.
- 2.7 All allowances will be reimbursed on the production of receipts (receipts must include the VAT element and the VAT registration number wherever this applies).
- 2.8 Expenses must be claimed on the **Claim for Reimbursement of Relocation Expenses** form at appendix 1 and all receipts attached. Payments will be included in the next available monthly salary in line with payroll processing deadlines and may be subject to tax.
- 2.9 Claims may be for individual elements as expenses are incurred, or for one single total.
- 2.10 Claims for any payments agreed must be submitted within one year from the date of appointment, although the Head of Corporate Services will have discretion to vary the period of this time limit in very exceptional circumstances.
- 2.11 Reimbursement Expenses will not be paid until the employee has completed one month's service.

3. FINANCIAL ASSISTANCE

Lodging Allowance/Travel Allowance

- 3.1 Whilst the employee is awaiting the move to their new home, assistance of up to £70 per week may be authorised for a period of up to 13 weeks.
- 3.2 This weekly sum of up to £70 may also be used to cover return travel costs between temporary accommodation and the family home.
- 3.3 Alternatively, if lodging allowance is not desirable, travel expenses between the family home and the place of work (where distance is greater than 40 miles) may be paid. Payment will be based on the public transport mileage rate or actual expenditure (whichever is the lower).

Search for New Accommodation

- 3.4 Travelling and subsistence expenses reasonably incurred to visit the area prior to commencement of employment may be reimbursed for a maximum of two visits. Travel expenses are paid at public transport mileage rates or actual expenditure whichever is lower.
- 3.5 Travel and subsistence expenses may also be paid in respect of the employee's partner or dependent relative, if they accompany the employee.
- 3.6 Where a lodging allowance is not being paid, similar expenses may be met for employees who have to reside in the area over a weekend in connection with the search for new accommodation.

Removal Costs

- 3.7 The council will meet the cost of removal of furniture and effects from the old home to the new home up to a maximum of £1,000. This sum will also cover insurance of goods in transit and storage costs if appropriate.
- 3.8 Reimbursement will be equal to the amount of the lowest of three competitive quotes. The employee must submit the three quotes to their Service Manager for review prior to engaging a contractor. Service Managers should be satisfied that the quotes are from legitimate companies and that all relevant paperwork is in order before passing to Human Resources for authorisation.
- 3.9 The employee may, engage any contractor from whom quotes were obtained if they undertake to pay the difference in cost between their chosen contractor and the lowest quote.

Travel Expenses on Removal

- 3.10 The new employee and their dependants, will be reimbursed the cost of travelling from the old house to the new at public transport mileage rates, or actual expenditure, whichever is lower.

House Sale and House Purchase

- 3.11 A sum of up to £1,000, including VAT, may be claimed towards the cost of house sale and purchase, including Estate Agents Fees, Conveyancing Fees, Stamp Duties, Recording Dues and Survey Fees.
- 3.12 The council will only meet the cost of Surveyors Fees in respect of one Home Buyers Report.

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RELOCATION ASSISTANCE SCHEME

CLAIM FOR REIMBURSEMENT OF RELOCATION EXPENSES

All expenditure is reimbursed in accordance with the council's Scheme of Relocation Assistance. Prior approval must have been given and all allowances will be paid only on the production of receipts. Expenditure may be claimed for individual items as expenses are incurred, or as a single claim.

Part A – TO BE COMPLETED BY CLAIMANT (please complete in BLOCK capitals)

Employee's Name:	
Post Held:	
Place of Work:	

DECLARATION

I confirm that the expenditure claimed is as a result of relocating my home to enable me to take up employment with West Lothian Council. I undertake to remain in the council's Service for a period of two years from the date of my joining the council and I understand I will be liable to refund expenses received (in full) should I leave within this period. I attach all relevant receipts.

Signed:	Date:
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TO BE WITNESSED BY LINE MANAGER

Witness's Name:	
Position:	
Service	

I confirm that the employee named above has, where appropriate, submitted to me for review 3 competitive quotes with regard to removal costs and I am satisfied that the quotes are from legitimate companies.

Signed:	Date:
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Part B – DETAILS OF CLAIM

Please list ACTUAL expenditure incurred and attach receipts for all items claimed.

PRE-EMPLOYMENT VISIT

Dates of Visit:	From:	To:
Transport Used:		

	Expenditure £	VAT £
Return Travel:		
Accommodation:		
Meals:		
Total		
Amount Authorised (HR use only)		

REMOVAL OF HOUSEHOLD GOODS

Actual cost of removal:		
Insurance:		
Storage:		
Total		
Amount Authorised (HR use only)		

HOUSE SALE AND PURCHASE

Conveyancing fees for sale & purchase:		
Estate Agents Fee:		
Survey Fees: (one home buyers report)		
Stamp Duties:		
Recording Dues:		
Total		
Amount Authorised (HR use only)		

Part B – DETAILS OF CLAIM (contd.)

LODGING ALLOWANCE/WEEKEND/DAILY TRAVEL

Dates of Period Claimed:	From:	To:
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	Expenditure £	VAT £
Lodging Claim (bed, breakfast, evening meal):		
Travel:		
Total		
Amount Authorised (HR use only)		

TRAVELLING EXPENSES ON REMOVAL (no receipt required)

JOURNEY DETAILS:

Method of Travel:	
Number of Adults:	Number of Children:

	Expenditure £	VAT £
Total Cost of Travel:		
Amount Authorised (HR use only)		

HR USE ONLY	Expenditure £	VAT £
Summary – TOTAL AUTHORISED		

Senior HR Adviser Signature:	Date:
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Part C – TO BE COMPLETED BY DEPUTE CHIEF EXECUTIVE

I confirm that the above employee has commenced employment with West Lothian Council and is entitled to financial assistance as detailed in the council's Scheme of Relocation Assistance. The council's Head of Corporate Services has given prior approval.

Signed:	Date:
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Part D – TO BE COMPLETED BY HEAD OF CORPORATE SERVICES

Signed:	Date:
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RELOCATION ASSISTANCE SCHEME

Application of the Relocation Assistance Scheme and payment of expenses in relation to relocation are subject to authorisation by the Head of Corporate Services as specified under Standing Orders. In order to ensure compliance, the following procedure should be followed:

PROCEDURE

Interview panel, in consultation with the Head of Corporate Services, will determine whether the scheme, in whole or in part, is applicable to an applicant, having regard to the general conditions of the scheme and the individual's particular circumstances.



Employee should be given a copy of the scheme, together with a claim form with clear instruction under which categories expenses claims may be made.



Where an employee intends to make a claim for removal costs, they must submit 3 quotes to their Service Manager for review prior to engaging a contractor.



Employee completes the claim form, attaching receipts and/or quotations as necessary and returns them to Human Resources* for authorisation.



Claim form must be signed by the appropriate Depute Chief Executive and Head of Corporate Services.



Head of Corporate Services authorises the claim and submits to Payroll for payment through the next salary.

* All claims, including any subsequent claims from the same employee, must follow this process. Senior HR Advisers/HR Advisers should ensure that claims under each category do NOT exceed the maximum allowable, and that claim details are kept on the employee's file in order to know the amount to be repaid should the employee leave the council within 2 years of joining.