

CITY OF YORK COUNCIL

RELOCATION ASSISTANCE

OVERVIEW

The document provides guidance to managers and staff alike in identifying whether, and to what extent, financial assistance is offered to new recruits who may require financial assistance in relocating to York to take up the post.

The document outlines the qualification criteria for relocation assistance, the amounts that can be claimed and gives details of how qualifying employees can make a claim.

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1.0 INTRODUCTION

- 1.1 City of York Council recognises that in order to recruit high calibre staff it is often necessary to advertise vacant posts in national publications and that the successful candidate may require financial assistance in relocating to York to take up the post. The purpose of this policy is to provide clear guidance to managers and staff alike in identifying whether, and to what extent, financial assistance should be offered.
- 1.2 The provisions of this policy are available to all new members of staff who apply for posts which, prior to appointment, are agreed by the appropriate member of the HR team as being eligible for relocation assistance. Posts eligible are those advertised in national and regional newspapers and journals (e.g. The Guardian, The Yorkshire Post). Posts advertised only in local media are not eligible for relocation assistance.
- 1.3 Any queries concerning any aspect of this policy should be raised in the first instance with a member of the HR team.

2.0 IMPLEMENTATION DATE

- 2.1 The provisions of this policy apply to all eligible employees who commence employment on the 1st April 2004 onwards.

3.0 ELIGIBILITY

- 3.1 If the new employee is buying and selling property, an absolute maximum of £6,740 (inc. VAT) in total (£3,370 inc. VAT if only buying or selling) is available to cover the costs incurred in relocating to York and specified in paragraph 2 of this policy, 'reimbursable costs'. Temporary Rent Allowance is also payable in these circumstances (see section 5).
- 3.2 If the new employee is moving from rented property to rented property and intending to buy a property, an absolute maximum of £5,050 including VAT (ie B + C below) can be claimed to cover reimbursable costs.

Note : to meet this criteria, they must buy a property within the time limits specified in paragraph 8.1. If they do not do so within the agreed time limit, the maximum amount claimable will need to be recalculated and any expenses that are above this limit repaid back to the council.

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- 3.3 If the new employee is moving from rented property to rented property and not intending to buy property, an absolute maximum of £1,680 including VAT can be claimed to cover reimbursable costs.

Summary of maximum amounts claimable:

Activity	Maximum Amount Claimable
A) Buying and selling	£6,740
B) Moving from rented to rented property with intention to buy (see para 8.1)	£5,050
C) Buying only	£3,370
D) Selling only	£3,370
E) Moving from rented to rented property	£1,680

- 3.2 Subject to the absolute maximums (£6,740, £5,050, £3,370 or £1,680), the new employee can claim for financial assistance under this policy provided that he/she:

- i) moves to within a 20 mile radius of their work location from a distance of at least 30 miles outside the city boundary. Distances will be measured by a straight line on the map.

AND

- ii) is moving to the York area solely as a result of taking up employment with the City of York Council and is not claiming funds, directly or indirectly, from other employers to cover relocation costs.

- 3.3 Subject to 1.1a and 1.1b above, staff may claim up to 100% of the relevant sum if appointed to a permanent contract or a fixed-term contract of initially 2 years or more. Up to 100% may be claimed whether the post is offered on a full-time, part-time or job-share basis. This policy does not apply to posts offered on a 'casual' contract.

- 3.4 The amounts claimable by staff appointed on a fixed-term contract are as follows:

Length of initial contract	Claimable
2 years or over	100% of maximum
18 months to less than 2 years	75% of maximum
12 months to less than 18 months	50% of maximum
less than 12 months	25% of maximum

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- 3.5 If the initial contract is extended, the sums available will be extended in line with the pro-rata figures. If the contract is extended to 2 years or more, up to 100% of the maximum becomes available.
- 3.6 In calculating the appropriate level of relocation assistance, (i.e. the 'personal maximum') HR will ascertain the facts relating to the eligibility criteria and calculate a resulting figure.
- 3.7 Where two partners work for City of York Council only one will be entitled to make a claim under the Relocation policy.

4.0 REIMBURSABLE COSTS

- 4.1 If you are buying and /or selling property, you may claim for any or all of the costs listed below, provided your claim does not exceed the amount specified in para. 3.1. Proof of costs incurred must be provided to support all claims.
- 4.2 If you are moving from rented property to rented property and do not intend to purchase property you may claim, as appropriate, for any of the costs listed below, provided your claim does not exceed the amounts specified in para. 3.1. Proof of costs incurred must be provided to support all claims.
- 4.3 Please note: If you are moving from rented property and state that you are intending to purchase property and do not do so within the agreed time limits then your personal maximum will be recalculated to that of rented property to rented property and you will be required to pay back to the Council the excess amount claimed back to the Council.
- 4.4 You may use up to your personal maximum sum to pay for any or all of the costs below in any proportion provided your total claim does not exceed your personal maximum sum inc. VAT and provided you give proof of purchase for all claims. Costs which are included under this policy are:

i) Removal Expenses and Storage Costs

You should obtain three quotes for removal from professional removal companies. It is in your interest to select the most competitive quote. You may claim removal expenses between locations more than once if necessary, provided your claim for this and the other fixed costs does not exceed your personal maximum. If you choose to do the removal yourself, you may claim van-hire costs instead, subject also to producing three quotes.

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ii) Family Travel and Accommodation for New Home Search and Removal to New Home

Staff may claim accommodation costs plus travelling expenses for themselves and their immediate family to search for a new home at any time after they have accepted an offer of employment with City of York Council. In addition, travelling expenses on the removal day for themselves and their immediate family from the old home to the new can be claimed at the lesser of second class rail rate or car mileage.

iii) Travel allowances

After taking up the post, travelling expenses back to your former home will be paid at the rate of second class return rail fare.

iv) Professional Fees

To cover legal, estate agents and mortgage redemption fees incurred in selling a property. Also the legal, mortgage and survey fees incurred in buying a property.

v) Disturbance Expenses

You may claim the cost of alteration or replacement of floor and window coverings (e.g. carpets and curtains), disconnection of services and conversions or installation of domestic appliances, provided that actual receipts are provided. This does not include the purchase of new electrical equipment or furniture, fitted or not.

vi) Telephone Calls

To a partner/solicitor/estate agent in connection with relocation, provided these are made from City of York Council premises using your own personal code supplied by Information Technology and Telecommunications. To claim you will need to send with your claim form a copy of the print out listing your calls.

vii) Loans for Bonds/Deposits

You may borrow a sum for a bond or deposit for temporary accommodation as an advance against your personal maximum allowance. For example, if you needed a loan of £500 for a bond, this would reduce your personal maximum by £500 until

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the loan was repaid. Repayment of the loan must start within three months of receipt under the terms agreed with your departmental HR Manager.

5.0 TEMPORARY RENT ALLOWANCE

(this is payable in addition to your personal maximum only if you are buying and selling property)

- 5.1 This allowance is available to encourage new members of staff to relocate their families to York even if they have not yet been able to sell their property elsewhere. For nine months you may claim 75% of the rental of a temporary home within the York boundary up to a maximum of £445 per month.
- 5.2 The Temporary Rent Allowance is only payable to those new members of staff who are actively trying to sell their property elsewhere. We will therefore ask you before you claim this allowance to provide a copy of the Estate Agent's details for your home, together with a letter from your estate agents confirming that your property is correctly priced for sale given current conditions in the local housing market. We will require further statements from your estate agents at intervals decided by the relevant member of the HR team. This allowance will only be paid whilst you are maintaining two homes.

6.0 MOVING LEAVE

- 6.1 For moving from temporary to permanent accommodation you will be granted 1 day's moving leave. This will be over and above your annual leave entitlement.

7.0 CLAIMS FOR REPAYMENT UNDER THE RELOCATION POLICY

- 7.1 New staff who want to make claims under this policy must register and sign an undertaking ([form RE/1](#)) before any payments are made. No payments will be made before a new employee takes up their post. Claims are made on [Form RE/2](#) and sent to the relevant member of the HR team with accompanying receipts.

8.0 TIME LIMITS

- 8.1 The time limits for making claims under this Policy are:
- i) for permanent contracts or fixed-term contracts of 2 years or more - 18 months from the date of commencement of employment;

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- ii) for fixed-term contracts of initially 18 months to less than 2 years - 12 months from the date of commencement of employment;
- iii) for fixed-term contracts of initially 12 months to less than 18 months - 9 months from date of commencement of employment;
- iv) for fixed-term contracts of initially less than 12 months – 6 months from the date of commencement of employment.

9.0 REPAYMENT OF EXPENSES CLAIMED

- 10.1 Staff employed on permanent contracts who leave the Council within 2 years of appointment will be required to repay a proportion of the relocation costs they have claimed. This is based on 1/24th of the total amount claimed for each complete month short of the 2 years service.
- 9.2 Staff employed on fixed term contracts who leave the Council before the end of their original temporary contract will be required to repay in full any sums they have claimed.

10.0 CHANGES TO RELOCATION POLICY

- 10.1 The City of York Council reserves the right to review this policy at any time and change the conditions and allowances payable. Staff are only eligible to make claims under the terms of the policy in force on the date their employment offer was made.
- 10.2 The figures contained in this policy are correct as at 1st April 2007. The financial limits will be automatically updated annually by the percentage agreed for the pay increase under the National Joint Council for Local Government Services employees. Please see [Appendix 1](#) for revised figures.

11.0 EXCEPTIONS

- 11.1 Exceptions to any of the above criteria or requirements are subject to the prior written agreement of a member of the HR Team, such agreement only being given in exceptional circumstances.

This Policy and Procedures were agreed at Personnel Committee, June 2004.

If you would like advice or further guidance please contact a member of the HR team.