

Relocation expenses scheme

1. Objective of the Scheme

To assist newly appointed officers in meeting the cost of relocation incurred as a result of taking up their appointments.

2. Eligibility

The scheme is applicable to officers:

- appointed to an established post and
- whose existing residence is outside a 30 mile radius of their new place of employment and whose permanent new residence is within a 20 mile radius of their new place of employment (by the shortest reasonable road route).

The relocation must take place within 12 months of appointment. In exceptional circumstances, the Chief Executive may agree to extend the entitlement period.

The scheme is also applicable to existing officers of Test Valley Borough Council whose place of employment is changed between Andover and Romsey, and whose residence is beyond the 30 mile radius of the new place of employment and whose permanent new residence is within a 20 mile radius of their new place of employment.

The scheme is applicable to both householders and non-householders.

3. Removal Expenses

The following expenses are only payable in respect of a move occurring within twelve months of the officer taking up the new appointment with this Council.

Reimbursement will be made towards the following expenditure at the rates indicated:

- 100% of reasonable costs incurred through moving furniture and effects from the existing property to the new property (including insurance and storage charges for up to 26 weeks) on the basis of the lowest of three competitive quotations.
- Legal expenses, estate agent fees, stamp duty, mortgage redemption fees, Building Society solicitor's and survey fee, Land Registry fees, private survey fees and advertising cost (where a property is sold without recourse to an Estate Agent) associated with the sale of the existing property and the purchase of the new property up to a maximum of £11,899.18 (excluding V.A.T.). Fees associated with the purchase only of a property up to a maximum of £5010.86 (V.A.T. excluded only if invoices made out to Test Valley Borough Council otherwise maximum figures include V.A.T.).

- A grant of £641.68 (with effect from 1 April 2008) as a contribution towards the incidental costs of moving house.
- Actual expenditure on second class rail fare, coach fare or, if travelling by car, the appropriate lease car mileage rate and, where appropriate, overnight subsistence costs of officer, partner and dependants on day of move. (Receipts require where appropriate)

4. Lodging Allowance

- An officer living in temporary lodgings (e.g guest house, bed and breakfast, rented accommodation) whilst necessarily maintaining an existing home, may claim a lodging allowance of £132.03 per week for a period of up to 12 months. The allowance will stop if the officer is no longer required to maintain the original home, (e.g. it is sold and the temporary accommodation becomes the main home). This allowance is taxable.
Where an officer is separated from his/her family or is maintaining the original home, reimbursement of actual expenditure on second class rail fare, coach fare or, if travelling by car, the appropriate lease car mileage for two home visits per month up to twelve months will be made. (Receipts required where appropriate).
- Officers who are non-householders, including year-out placement students and, therefore, are not maintaining a home elsewhere when commencing employment with the Council, but live in temporary accommodation initially, can claim a lodging allowance of £132.03 per week for six weeks, reducing to £66.01 per week for a further six weeks. The allowance will cease when suitable accommodation has been obtained, if within the twelve-week period. This allowance is taxable.

5. Travelling Allowance

Officers electing to travel daily from their existing residence from the date of their appointment until the date of removal or for twelve months, whichever is the shorter, and thus incurring additional travelling costs, can claim a travelling allowance to cover the mileage travelled less 60 miles per day for each return journey. The mileage rate to be claimed is equal to the Council's leased car mileage rates regardless of whether or not claimants have a leased car.

6. Reimbursement

All claims must be supported by receipts unless the Council is to be invoiced. Officers must obtain three competitive quotations for removal expenses and select the lowest. The quotations must then be sent to Personnel. Prior approval is not required unless the Officer wishes to use other than the lowest.

Invoices for expenses claimed under **3. Removal Expenses** (i) and (ii) must be made out to Test Valley Borough Council and submitted to Personnel for payment. A written undertaking confirming that the Council will pay these expenses, will be provided by Personnel on request. Invoices paid personally must be submitted to Personnel for reimbursement. The grant for incidental expenses will be paid by Personnel on completion of the removal and all necessary paperwork.

Reimbursement under **4, Lodging Allowance**, will be made on submission of a Travel & Subsistence Claim form and sent to Personnel for authorisation.

All expenses claimed must be supported by the original invoice or bill which will be retained by the Council. Officers will be required to sign an undertaking confirming that the expenses have not been claimed from any other source.

7. Taxation of Expenses and Allowances

Staff will be liable to pay tax on relocation expenses if in total they exceed £8,000.

If an individual does not relocate, all expenses and allowances claimed become taxable and the Tax Office will be notified accordingly.

8. Inflation Roofing

Entitlements under the incidental costs grant will be updated on 1st April each year in line with the percentage change in the General Retail Prices Index for the previous calendar year. Expenses under 3 (ii) will be updated on 1st April each year in line with a percentage figure provided by the Head of Finance based on Building Society statistics (the percentage to relate in both cases to the change over the twelve calendar months of the previous year). Any increase will be applied to expenditure incurred on or after 1st April.

The Lodging Allowance will be maintained at a level no less than the N.J.C rate for transferred officers.

9. Repayment

All officers wishing to obtain the benefit of this scheme will be required to sign an undertaking that in the event of their resignation or dismissal within three years of the applicable date, any payments made under the scheme will be repaid to the Council as follows:-

Service from applicable date Repayment

Up to 1 year	100%
1 - 2 years	66.66%
2 - 3 years	33.33%

10. The three year period for reimbursement of Lodging Allowance will commence on the date of appointment.

11. The three year period for reimbursement of Removal Expenses will commence on the completion date of the purchase of the officer's property.
12. An officer claiming expenses under section 4, Lodging Allowance, for non-householders will be required to sign an undertaking that in the event of their resignation or dismissal before the end of their contract, any payments made under section 4 of the scheme will be repaid to the Council, reduced by one twelfth for each completed month of service.
13. An officer on a fixed term contract of less than three years who remains for the full period of the contract will not be required to repay relocation expenses.