



ABERDEEN
CITY COUNCIL

RELOCATION POLICY

POLICY

Approved by the Finance, Policy and Resources Committee on 1 December 2016

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SECTION 1: INTRODUCTION

Policy statement

The Council recognises that relocation can be a difficult, unsettling and costly experience affecting new employees and their families. This policy is intended to provide financial assistance to help a new employee and their family to relocate to the Aberdeen area and in doing so help improve the staff experience.

This policy also serves as a recruitment tool as it is acknowledged that it can be more costly where there are hard to fill posts to continually re-advertise than to offer a relocation package to candidates, which should help improve the use of resources. By having employees with the right skills and behaviours in post this should help improve the customer experience through the provision of higher quality levels of service.

SECTION 2: SCOPE

Scope

This policy applies to eligible new employees who have to relocate to the Aberdeen area to take up their appointment.

The policy is designed to help ensure that the Council has an adequate supply of employees at all levels of the organisation. It only applies to specific posts as pre-determined by the appropriate Directorate in conjunction with the HR Service.

This policy only applies to eligible permanent appointments, or (where it is clearly determined at the outset) for eligible fixed term appointments of 2 years or more. In the case of fixed term appointments of more than 12 months but less than 2 years, a proportion of the total allowances covered by the policy may be paid in exceptional circumstances (e.g. for highly specialised posts or for specific projects where the likely source of appropriate applicants is further afield). This will be determined by the appropriate Head of Service in consultation with their HR Business Partner. It should be noted that no further payments would be made if the fixed term appointment is then extended or made permanent.

SECTION 3: CORE PRINCIPLES AND OTHER CONSIDERATIONS

Core Principles

- The total relocation package cannot exceed the overall limit detailed under Section 4 and employees are expected to exercise reasonableness when making claims.
- The new place of residence is required to be in a location which will enable the employee to fulfil their contractual obligations and responsibilities.
- Employees appointed on a part-time basis are subject to the same allowances and conditions as those appointed to full-time posts.
- The Council will not pay any relocation expenses which have already been paid or are to be paid by another employer or organisation, and employees are therefore required to inform the Council if particular relocation expenses have been met from another source (e.g. from the employer of another member of the household).
- All expenditure must be actually and necessarily incurred and supported by detailed original invoices/receipts and forwarded together with a relocation expenses claim form for authorisation by the appropriate Head of Service before reimbursement is made.
- Relocation expenses are normally only payable from the port of entry to the UK.
- The Council will not be liable for any losses an employee incurs in connection with their relocation.
- Relocation expense claims normally must be made no later than 12 months after the employee's start date.
- If an employee is found to have abused the provisions of this policy then the matter will be dealt with under the Council's Managing Discipline Procedure.

Other Considerations

- As an overall limit of expenditure applies to the policy, employees are required to undertake a competitive assessment of each element of expenditure they incur to achieve best value for money.
- Any queries regarding eligibility for any parts of the policy should be referred, in writing, to the appropriate Head of Service before any commitment is undertaken by the employee.
- If it is considered inappropriate to approve payment (or part of a payment) in respect of an employee's claim and the employee feels

aggrieved, they may raise a complaint through the Managing Grievances procedure.

- Employees who qualify for relocation expenses are encouraged to relocate, if possible, to an area, or near to an area, served by a public transport link i.e. a bus or rail service.

SECTION 4: EXPENSES THAT CAN BE CLAIMED

Qualifying Expenses

The following expenses may be claimed, exempt of tax and National Insurance, within defined HM Revenue and Customs (HMRC) limits up to a maximum overall value of £8000, excluding VAT:-

- Pre-employment Visit To The City and Surrounding Area
- Lodging/Commuting Expenses
- Legal/Estate Agents' and Mortgage Fees
- Removal Expenses and Storage Costs
- Bridging Loan Interest
- Settling-in Allowance

A detailed explanation of what can be claimed under the above headings can be found in the accompanying Guidance.

Non-qualifying expenses

It should be noted that monies are paid for the expenses of relocation. This DOES NOT include any rental deposit that may be required in advance by an employee's landlord and also does not include the payment of Council Tax or utility bills.

Home entertainment products such as televisions, games consoles, audio equipment and information technology products such as tablets, pc's, laptops and mobile phones are not domestic goods and therefore are also non qualifying expenses. Please note that this list is not exhaustive.

SECTION 5: REPAYMENT

The purpose of this policy is to assist the Council in recruiting employees. Consequently an employee must sign in advance an undertaking that, in the event that they do not complete two years' service with the Council, they will be required to refund to the Council the following sums:-

Period of service (from date of commencement of employment)	Amount to be repaid (as a percentage of total expenses claimed)
Leaving 0-6 months from date of commencement of employment	100%
Leaving 7-12 months from date of commencement of employment	50%
Leaving 13-18 months from date of commencement of employment	25%
Leaving 19-24 months from date of commencement of employment	12.5%

The requirement to repay the assistance granted will not be enforced where the contract of employment is terminated by the Council for reasons other than serious/gross misconduct, for example due to retirement on medical grounds or redundancy.

With regard to employees on non-permanent contracts of more than 12 months but less than 2 years, who have been eligible and have claimed relocation expenses, such staff will also be required to refund the Council a proportion of the monies received, based on the duration of the contract, should they decide to leave the Council prior to the end of their appointment. The exact amount of repayment will be determined by the appropriate Head of Service in consultation with the appropriate Director and Head of HR.

SECTION 6: REVIEW OF THE POLICY

The HR Service will review this policy every 3 years. It will, nevertheless, be subject to continual review and amendment in light of experience of its operation, employment best practice and statutory requirements. Changes will only be made following normal consultation arrangements.