

HIGHLAND AND WESTERN ISLES VALUATION JOINT BOARD

21 November 2013

Agenda Item	9
Report No	VAL 18/13

Relocation and Removal Scheme

Report by the Clerk

Summary

This report seeks approval of a revised Relocation & Removal Scheme for Board employees.

1. Background

- 1.1 The Highland and Western Isles Valuation Joint Board operated their policies and procedures in line with those approved by Highland Council.

2. Relocation and Removal Scheme

- 2.1 In the recent recruitment exercise to appoint the Assessor & ERO, it came to light the current Relocation and Removal Scheme being used by the Board has not been updated and reference to specifically financial assistance is dated 2002.

3. Main Changes

- 3.1 The proposed main changes to the scheme relate to an increase in financial assistance which can be claimed for removal expenses, legal and other fess, housing and lodging assistance and incidental expense relating to the move eg telephone installation, curtain, carpets.
- 3.2 There has also been an extension to the period of lodging allowance which can be claimed ie where an employee is required to move to temporary accommodation to be close to their new work location, whilst maintaining their current home. It is proposed the period increases to 26 weeks from 12 weeks, which is consistent with the provision of Highland Council's scheme.
- 3.3 A copy of the proposed scheme is attached for reference.

4. Financial Implications

- 4.1 The total relocation and removal package which can be claimed has increased to £6,500 (inclusive of VAT). There are no other resource; legal; equalities; climate change/carbon clever; or risk implications arising from adopting the revised policy.

5. Recommendation

The Board is invited to approve:

- i. the revised policy as attached; and
- ii. any increase in rates and sums payable as reviewed annually on 1 April by Highland Council.

Designation: Clerk

Date: 13.11.13

Author: Elaine Barrie, Personnel Manager

Background Papers:

THE HIGHLAND AND WESTERN ISLES VALUATION JOINT BOARD

RELOCATION AND REMOVAL SCHEME

1. Introduction

- 1.1 This Scheme details the financial assistance available to eligible employees who are required to move home in order to take up an appointment with the Board. It addresses relocation, removals, temporary accommodation and allowances. Notification of entitlement to relocation assistance will be confirmed in the post details given to job applicants.

2. Scope and eligibility

- 2.1 The Scheme applies to any person appointed to a Board post, who, in the view of the Board, must move home in order to take up the appointment. Where a post is graded below APT&C spinal point 19 or the equivalent salary level, the Boards' Personnel Adviser must be consulted to determine whether or not the provisions of the Scheme should apply.
- 2.2 The Scheme will **only** apply where the person is appointed on a contract of employment which is expected to last for 2 years or more. Exceptions to this provision will be considered on a case by case basis by the Assessor & ERO or delegated manager.
- 2.3 The home must be within reasonable travelling of the employee's place of work. The Assessor & ERO must be satisfied in advance with the proposed location of the home, taking into account the level and the nature of the employee's job, contractual obligations (particularly bearing in mind possible adverse winter conditions), and personal circumstances.
- 2.4 An employee must declare an intention to move at the time of acceptance of offer of appointment, and must move within 12 months.

Relocations after the 12 month period will **not** qualify for reimbursement of any expenses. However, in exceptional circumstances, the Assessor & ERO, in consultation with the Board's Personnel Adviser, may extend this period.

- 2.5 An employee will not be eligible to make a claim under the Scheme, if any member of the same household receives financial assistance towards the cost of the move from any other source.
- 2.6 The overall maximum amount payable to an employee in respect of Sections 3, 4, 5 and 6 is **£6,500** (inclusive of VAT).

3. Removal Expenses and Leave

- 3.1 Assistance will be provided (subject to the overall maximum of £6,500 as per Section 2.6) with:
- **BOTH** removal of furniture and effects, including in transit insurance from old home to new - reimbursement to be equal to the amount of the lowest of 3 competitive tenders submitted in advance of the removal to the Assessor & ERO or delegated manager for approval,
 - **AND** necessary storage of furniture and effects including insurance for a period not exceeding 3 months, where a permanent move cannot be made immediately, reimbursement to be equal to the lower of 2 competitive tenders, including interim access to the storage.

Claims for the above assistance should be made using RR/1 Form attached. Claims must be accompanied by original invoices or receipted invoices. Payment is made by cheque.

- 3.2 Employees will be granted 2 days paid leave at the date of removal.
- 3.3 The cost of self drive removal may be authorised on the basis of invoices covering hire charges, insurance and fuel, provided this does not exceed the lowest tender for removal from the contractor. (You must still supply 3 competitive tenders from contractors if you decide to do self drive removal).

4. Relocation Legal Expenses and other fees

4.1 Relocation legal expenses and other fees connected with sale and purchase of residence, or land for house building, or any successful bona fide attempt to purchase

The Board will refund legal and other fees provided the employee moves home within 1 year of commencement of employment in the new post (subject to the overall maximum of £6,500 as per Section 2.6) as follows:

- Approved legal and/or estate agent or auctioneer fees (inclusive of survey fees, stamp duty, bridging loan fees and *mortgage redemption fees) relating to the purchase of a house or purchase of land for one house, and sale (if any) of a previous house.

Claims should be made using form RR/2 attached. Claims must be accompanied by original invoices or receipted invoices. Payment is made by cheque.

*** Please note that early mortgage redemption penalty charges are not claimable under the Scheme.**

5. Housing and Lodging Assistance

- 5.1 The Board may be able to provide temporary accommodation to employees taking up appointment with the Board. Details of the assistance will be confirmed to the employee.
- 5.2 Where an employee has to move into temporary accommodation (either a rented house or lodgings) and is maintaining his/her previous home the Board will grant financial assistance (subject to overall maximum as per Section 2.6) towards the cost of such temporary accommodation up to a maximum of £75.00 per week for a period not exceeding 26 weeks. Payment will cease if the employee, within that 26 week period, is no longer maintaining the former home.
- 5.3 Such assistance will be subject to the submission of receipts detailing the actual cost of rented accommodation for the period concerned. Claims for such assistance should be made using form RR/3 attached. Payment is made by cheque.

6. Incidental Expenses

- 6.1 Assistance will be provided up to a maximum of £500 (and subject to the overall maximum of £6,500 as per Section 2.6) with incidental expenses connected with the move e.g. curtains, carpets, telephone installation.
- 6.2 Such assistance will be subject to the submission of receipts. Claims for such assistance should be made using form RR/4 attached. Payment is made by cheque.

7. Travel to the New Home

- 7.1 Travelling expenses and subsistence allowances for the employee and dependants from the old home to the new home at public transport rates (second class if by rail), or the public transport mileage rate (currently 21.2p) if the whole family travels by car, whichever is actually incurred. Claims for such assistance should be made on form RR/5 attached and must be submitted within 3 months of the date of travel. Payment is made by cheque.
- 7.2 Travelling expenses for the employee and his/her partner for one return journey to new location prior to taking up appointment to assist with the search for a new home for example. Expenses will be paid at the public transport rate (second class if by rail) or the public transport mileage rate (currently 21.2p) if the employee and partner travel by car, whichever is actually incurred.

Claims for such assistance should be made on form RR/5 and must be submitted within 3 months of date of travel. Payment is made by cheque.

8. Repayment of sums received through the relocation and removal scheme

- 8.1 Where an employee voluntarily leaves the service of the Board within a period of two years from the date of commencement of employment, he/she will be required to repay to the Board a proportion of all sums paid by the Board (as per Sections 3, 4, 5, 6 and 7 above) in accordance with the following:

Date of Leaving	Amount Repayable
- Within 1 year of date of commencement	Full Refund
- 1 year – 18 months	50% refund
- 18 months – 2 years	25% refund

9. Method of claiming and payment

- 9.1 Claims must be submitted to the Assessor & ERO on the appropriate form and shall be accompanied by original invoices or receipted invoices. Claims must be submitted within one year of the date of commencement of employment with the Board (unless the period is extended as per para 2.4 above) (or within 3 months if claiming under para 7.1 or 7.2 above).

10. Revision of rates

- 10.1 The rates and sums payable under this scheme will be subject to annual review and revision at 1 April of any year by the Highland Council, using inflation indices as deemed appropriate by the Director of Finance.