



Relocation Assistance Policy

Hiring managers may offer relocation assistance to attract candidates for vacancies that are hard to fill. Such offers will be subject to the approval of a business case by HR.

Business case approval and maximum amount that can be claimed

A business case will need to be approved by the Head of HR&OD (or a senior officer within HR designated by them). This Policy covers reimbursement for a variety of expenses; it does not seek to place strict limits on a per-item basis, although the level of assistance available is subject to a 'ceiling' depending on the particular circumstances of each case.

- In most cases where a need to offer assistance to attract candidates for a post is identified, the maximum amount of assistance available under this Policy will be limited to £8,000.
- In exceptional cases, the amount of relocation assistance can be extended to a maximum of £15,000.
- Due to the high cost of housing in and around Surrey, the maximum amount of relocation assistance can be extended to £30,000 if the appointee intends to buy a residential property in order to facilitate taking up the appointment.

Commented [PMB1]: Changes as set out in para 23 of Committee report

Tax rules stipulate that eligible relocation cost refunds up to £8,000 are exempt from tax and National Insurance contributions. Any reimbursement of relocation costs exceeding £8,000 will be treated as taxable earnings and will attract NI contributions. The hiring manager will need to liaise with Employee Services in order to make relevant arrangements and ensure correct reporting to HMRC.

Commented [PMB2]: Clarification as described in para 26 of PPDC report

Eligibility

To qualify for help with this discretionary scheme regarding relocation, the individual should be:

- An existing employee that needs to relocate because of promotion, or .
- an external candidate offered an appointment on Surrey Pay terms and conditions, either on a permanent or fixed-term basis, and
- The individual has a need to move home due to the journey to work being considered unreasonable
 - The move is to a new home within "reasonable travelling distance" of the new post from a home that is at least 20 miles away
 - The new home must also be at least 15 miles nearer to the new place of employment in comparison to the old one

Commented [PMB3]: New facility as outlined in para 27 of PPDC report.



This policy does not apply to fire-fighters, who may be eligible for assistance through a SFRS scheme. This policy does not ordinarily apply to employees engaged on a 'bank' basis or working in a school under the direction of a Governing Body.

Permanent employees receiving relocation assistance will be required to sign an agreement confirming they agree to stay within SCC employment for a minimum of three years. Employees who leave the Council within the three year period will be asked to repay a proportion of the allowance, unless they have been made redundant, or the Council dismisses them at the end of a fixed-term contract (e.g. due to the return of a substantive post holder from maternity) . Repayments will be calculated on the number of complete months that the employee has worked for the Council. For example, an employee commencing work on 1 October 2018 and resigning with effect from 8 May 2020 would be required to repay 47.2% of the amount they received for relocation assistance, as they would have worked for 19 complete months out of the 36-month minimum.

Commented [PMB4]: Example added for clarification.

Relocation assistance is broken down into five categories:

- Separation allowance
- Daily travel allowance
- Travel expenses into the UK
- Fees relating to moving house:
 - Legal fees - Removal allowance
 - Disturbance grant

The appropriate relocation assistance form(s) must be fully completed for all types of relocation. No claims will be accepted without the appropriate form(s) and receipts.

How to apply for relocation assistance

The hiring manager/Head of Service should compose a business case, obtain support from their Strategic Director, and forward it to the HR Reward Team for approval.

If approved, the hiring manager should complete the 'Relocation assistance claim and eligibility form' and send to Employee Services at sscemployeeservices.enquiries@surreycc.gov.uk for processing. Employee Services will then send a confirmation email to the employee informing them of when they will receive the payment.

Separation allowance

An allowance paid if the employee is living in temporary accommodation for up to one year while supporting a household based away from their new workplace. This is to enable them to look for a permanent residence, and resolving any issues around the education and/or employment arrangements of other family members.

Commented [PM5]: Facility extension as described in para 28 of Ctte paper.



Depending on the type of accommodation, an employee can claim for either:

- Bed and breakfast, or
- Rent on temporary accommodation

An employee can also claim separation allowance if they are living in temporary accommodation with their family unit, whilst paying expenses on their former home. In this case, claims can be made for whichever is the lesser amount of:

- Mortgage repayments or rent on the former home, or
- Rent on the temporary accommodation.

For the purposes of this policy, the definition of 'family unit' consists of the spouse, partner, or civil partner of the employee, and dependent children under the age of 18.

Amount of separation allowances: Where a daily rate applies (e.g. in hotels), payments will be based on a weekly maximum of five nights per week.

Proof/ Documentation needed:

- Proof of rental/ temporary accommodation payments or receipts for bed and breakfasts;
- mortgage payments or rent on former property if applicable, or proof of notice period if employee is moving from former rented accommodation, otherwise rent owing is assumed to be nil.

Daily travel allowance

Instead of the separation allowance, individuals may wish to travel daily to work from their current family home and claim a travelling allowance. These costs can include:

- Travel by public transport or
- Private vehicle

Claims for travel by private vehicle must be for the shortest route by road and cannot include official business mileage. Employees should be mindful of the potential well-being and safety implications of commuting over long distances.

Amount of allowance (Daily travel):

Public transport: reasonable public transport costs; the standard HMRC mileage reimbursement rate can be used as a point of reference (e.g. if the HMRC rate is 45p per mile, £45 can be deemed reasonable for a one-way rail fare for a 100-mile journey).

Travel by private vehicle: the HMRC rate applicable to the category of vehicle.



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The daily travel allowance may be paid for up to one year from the date of appointment.

Commented [PM6]: Facility extension as outlined in para 28 of Ctte paper.

Travel expenses into the UK

An allowance paid covering the relocation for employees moving from abroad. These costs can include:

- Relocation of individuals to take up residence in the UK from abroad
- Relocation of individuals immediate family to the UK from abroad
- Port of entry for those employees moving from abroad

Amount of allowances:

- Flights to the UK for individuals to take up residence in the UK
- Flights to the UK for members of an appointee's family unit
- Travel from the UK port of entry for those employees moving from abroad – the actual amount paid from the employee's port of entry
- Reimbursement of one-off scrutiny payment to HCPC for overseas workers. Annual registration fees are covered by the Professional Fees policy.
- Visa application fees including first year medical surcharge incurred
- Passport fees

Period of payment: Usually paid as a lump sum. Proof/documentation needed: Receipts

Fees relating to moving house

Legal Fees

An allowance paid if the employee is moving house and requires assistance with related fees. These costs can include but not limited to:

- Solicitors
- Surveyors
- Estate Agents
- Advertising
- Stamp duty



The sale and/or purchase of properties must occur within the first 12 months of the employee's appointment. However, this limit may be extended if difficulties with the sale and/or purchase occur but only if an explanatory letter and evidence are provided. Period of payment: Usually paid as a lump sum.

Proof/documentation needed: Receipts

Removal allowance

An allowance paid to assist with the additional costs of moving house. These costs can include:

- Professional removal
- Self-drive van hire - including paid assistance and fuel
- Travel for the employee and their family to move
- Necessary and reasonable storage expenses

Amount of allowances:

- ☐ Professional removal - the amount the lowest of two quotes or the actual amount incurred, whichever is less.
- ☐ Self-drive van hire - including paid assistance and fuel - the amount of the lowest of two quotes for professional removal or the actual amount incurred, whichever is less.
- ☐ Travel for the employee and their family to move – the same rules apply for the daily travel allowances (see below).
- ☐ Necessary and reasonable storage expenses - the amount of the lowest of two quotes for storage or the actual amount incurred, whichever is less.

Period of payment: Usually paid as a lump sum based on receipts and quotes.

Proof/documentation needed: Two written estimates and/or receipts for each of the removal allowances listed above, except 'Travel for the employee and their family to move'.

Disturbance grant

This is a payment that helps to assist with additional expenses needed to settle into a new home. These costs can include but are not limited to:

- Reconnecting domestic appliances
- Replacement of floor coverings/ curtains
- Essential furniture, for example bed, table
- Electrical appliances, for example toaster, kettle, fridge



Period of payment: Usually paid as a lump sum.

Proof/documentation needed: Receipts.

What cannot be claimed for under relocation assistance?

Relocation assistance is about reimbursing an individual for additional costs incurred because they are moving to Surrey. It is not possible to claim for everyday costs everyone incurs e.g.:

- Food
- Commuting to work from their new home
- Household bills
- Cleaning
- Mobile phone
- Car
- Rental bonds
- Mortgage payments
- Clothes
- On-going medical surcharge for access to the NHS after the first year
- On-going professional fees (employees may be able to claim for them under the Professional Fees Policy)