

## RELOCATION POLICY

### POLICY STATEMENT

1. PHSO aims to manage staff relocations to an alternative PHSO office in a fair, consistent and considerate way, whilst ensuring that business needs are met effectively. This policy covers both voluntary and business led relocations and provides guidelines to ensure that relocations are completed with the minimum disruption and inconvenience.

### PURPOSE AND SCOPE OF POLICY

2. This policy establishes a framework for employees who relocate between PHSO sites through:
  - relocation at the employee's request - voluntary (permanent or temporary);
  - permanent relocation due to a PHSO business reason;
  - temporary relocation for a PHSO business reason.
3. This policy applies to all PHSO employees.
4. Relocation requests from individuals on secondment from other organisations will be considered on a case-by-case basis, and in consultation with their permanent employer.

### PRINCIPLES

5. The following principles apply:
  - financial support is not available where the relocation is at the employee's request;
  - following a permanent (voluntary or business led) relocation the employee has no automatic right to revert back to the previous workplace;
  - PHSO will not normally provide financial support for new joiners taking up their first post. It is the responsibility of the new joiner to make themselves available at the place of work specified in the offer letter/contract;
  - relocation requests from employees who are on probation will not usually be considered until the probation period has been successfully completed;
  - voluntary relocation requests will only be considered from employees rated as Effective;
  - should PHSO require an employee to move location, the Office will offer reasonable assistance to facilitate that move and, where it is able to do so, to minimise the expense to the employee.

## OUTCOMES

6. The outcomes of this policy are that:
  - relocation decisions support business needs on both PHSO sites;
  - employees feel that decisions have been made fairly; and
  - employees feel that their relocation from one PHSO site to another has been effected smoothly and with due consideration of their personal circumstances.

## MONITORING AND REVIEW

7. A formal review of this policy will take place every 3 years unless there is a significant change in relevant legislation or business need which triggers a review before then.

## Annex A

### RELOCATION PROCEDURE

#### 1. Voluntary Relocation

- 1.1 An employee may make an application to relocate on a permanent or temporary basis, to either of PHSO's two sites. Before making a written request to their Director/Head of Function the employee should discuss the matter with their line manager.
- 1.2 The written request must include:
- the reason for the request;
  - anticipated start date and end date, if applicable; and
  - any support/adjustments which might be required in order to effect the relocation.
- 1.3 On receipt of a written request for voluntary relocation, the Director/Head of Function will consider the request, discuss it with HR, People & Talent and make a recommendation to their Executive Director after taking into account the following:
- the impact on operational effectiveness;
  - the nature of the employee's current role and whether it can reasonably be carried out at a different site;
  - whether any specific requirements either of the role or the individual can be accommodated in the new location;
  - the location of team colleagues, manager and key PHSO contacts;
  - the employee's reason for the relocation;
  - the employee's performance and conduct (e.g. recent PDRS reports/disciplinary record);
  - length of contract with PHSO;
  - skills, knowledge and experience (both the gap left and the need for these in the new location);
  - induction and training needs at each site;
  - anticipated start date and/or proposed duration of the proposed relocation;
  - costs (for example of any additional travel or technological requirements that may be necessitated by relocation).
- 1.4 If more than one employee expresses an interest in moving to a similar role at the proposed new location and there are insufficient roles/facilities available, the Director/Head of Function will discuss this with their Executive Director. Following this discussion the Director/Head of Function will apply criteria, such as those set out above in order to determine which employee(s), if any, should be recommended for relocation.
- 1.5 The relevant Executive Director is the decision maker for relocation applications. After considering the recommendation and taking advice from HR, People & Talent and Service Delivery (in terms of accommodation), they will confirm their

decision in writing to the individual. The letter should be copied to the Director/Head of Function and HR, People & Talent.

#### **1.6 Application Approved**

Where a request has been approved, the employee's line manager will liaise with the employee and the relevant Service Delivery areas to ensure that arrangements are in place for the transfer.

1.7 The individual, their line manager and any new line manager, will be responsible for agreeing the details of the move, ensuring that these are within any parameters set by the Executive Director. For example, the timing of the new start date, hand over of work in the old role/location, advising ICT and Service Delivery of the timing so that equipment is available. This is particularly important if the individual has any non standard equipment.

#### **1.8 Application Declined**

Where a request for voluntary relocation has been declined, the letter confirming the decision will also set out the reasons for the decision. In all relocation cases, voluntary or permanent, the decision of the Executive Director is final; there is no right of appeal.

#### **1.9 Advertised Roles at an Alternative Location**

If an individual wishes to apply for an advertised role at an alternative PHSO location, and is successful in their application, this is classified as a voluntary move and does not qualify for financial support.

### **2 Permanent Relocation for Business Reasons**

2.1 All PHSO staff at Pay Band C and above are contractually mobile, which means that employees may be required to work at an alternative location should the business require it. However, PHSO will aim to avoid reliance on this contractual provision wherever possible and will normally seek to enact any proposed/potential relocations with the agreement of staff.

2.2 Business led relocations may emerge where the Leadership Team decides that there is a business need to relocate a particular role/function or skill set from one of PHSO's sites to the other. In such circumstances PHSO will consult with the employee(s) concerned.

#### **2.3 Individual Post or Function**

Where an employee is filling a post that is to be relocated for business reasons, the individual will be notified of the proposed structural changes by their Director/Head of Function, supported by HR, People & Talent where appropriate. The same process will be applied if PHSO decides that a function should move to an alternative location.

Where a post moves to an alternative location, for a business reason, PHSO is committed to supporting individuals. The manager (with HR, People & Talent) will meet with the employee to discuss matters such as relocation details, potential suitable alternative employment options in the existing location, and other alternatives, where these are available. The alternatives will be specific to

individual situations and will be discussed on a one to one basis should that be necessary.

#### **2.4 Selection for a Relocating Post**

Where post(s) are to move location, for business reasons, but there is more than one person considered eligible, and wishes to be offered the opportunity for a permanent relocation, then all suitable employees will be invited to submit an expression of interest to HR, People & Talent.

2.5 The expression of interest must be supported by the relevant Director/Head of Function, following consideration of, but not be limited to, the following:

- the employee's performance and conduct (e.g. recent PDRS reports/disciplinary record);
- length of contract;
- skills, knowledge and experience;
- skill and induction and training needs at each site; and
- availability (impact on the business of relocating them).

2.6 The relevant Executive Director will reach a decision on expressions of interest and will advise the employees concerned of their decision in writing.

2.7 An employee who is permanently relocating to another of PHSO's site for business reasons will be reimbursed for reasonable costs associated with the relocation and can claim up to a maximum of £8,500 in expenses as set out in section 4 below.

### **3. Temporary Relocation for Business Reasons**

3.1 Temporary relocations will usually be to temporarily fill a gap in skills or experience and/or to provide support, induction, training or supervision for employees at the destination site.

3.2 Where the business identifies a need for a temporary relocation, this post will not necessarily be advertised as it is likely that particular skills or experience are required for this specific piece of work. However, should it be the case that more than one individual could undertake this piece of work then the selection process for temporary relocation will be in line with permanent relocation for business reasons as set out in section 2 above.

3.3 A temporary relocation will usually last for no longer than 6 months and may, depending on the business need, be on a part-time basis (eg. 2-3 days per week).

3.4 Reasonable out of pocket expenses including travel and living expenses will be payable in accordance with PHSO's Travel and Subsistence Code. Where the location is for an extended period it is expected that value for money considerations will apply such as renting serviced accommodation as opposed to nightly hotel costs. Individual temporary relocation circumstances will be discussed on a case by case basis.

3.5 The amounts payable under the Travel and Subsistence Code must be claimed before the end of the tax year in which the expenses were accrued.

#### 4 Relocation Support (Business Led relocation)

4.1 Decisions on eligibility for relocation support will be taken by the relevant Executive Director. An employee will be eligible to receive consideration for relocation support only in cases of permanent relocation which have occurred for business reasons (section 2 above).

4.2 There is a partial tax, NICs and reporting exemption if PHSO provides an employee with relocation expenses or benefits that meet all four sets of qualifying conditions set out below.

1. The employee's reason for relocation must be a change in the place where their employment duties are normally carried out.

2. The expenses and benefits must fall into one of the six categories below:

- the employee's sale of their old residence;
- their purchase of a new residence;
- transporting the employee's belongings to the new residence;
- associated travel and subsistence costs;
- domestic goods for the new premises;
- bridging loans.

3. The expenses must be incurred, or the benefits provided, before the end of the tax year after the one in which the employee's circumstances changed.

4. The employee's new residence must be within reasonable daily travelling distance of their new normal place of work, and their old residence must not be within reasonable daily travelling distance of the new normal place of work.

4.3 Relocation support may not be available in the following circumstances:

- if the employee maintains (or intends to maintain) two places of residence for an indefinite period;
- if their partner's employer is funding costs of relocation;
- if the employee's new residence is not within reasonable daily travelling distance of their new normal place of work.

4.4 Subject to above, PHSO will provide **financial support** for employees who are permanently relocating to another site up to a maximum of £8,500. The underlying principles in providing financial support are that:

- reimbursement is provided on the provision of receipts, tickets and other documentary evidence of expenditure, as appropriate;
- expenses are reimbursed on the basis that the employee is moving to a similar standard of accommodation as their present residence. Whilst it is open to

- employees to move to a better type of property than they currently occupy, PHSO will not reimburse any additional costs incurred by this process ; and
- the employee is required to show (eg. by providing evidence of estimates) that they have researched and chosen the most cost-effective option, for example off-peak, standard class rail travel or utilising discounts wherever reasonable and practicable.

4.5 Employees may choose one or more forms of financial support from the menu of options provided in the table below. This is dependent on their individual circumstances and needs, up to a maximum total of £8,500.

<b>Menu of financial support options</b>
Reimbursement of standard class train fares or travel expenses (in accordance with the Travel & Subsistence Code for: <ul style="list-style-type: none"> <li>conducting a preliminary visit to the area with immediate family, to gain general information about facilities, services and a first hand impression of the city and/or neighbourhood; and</li> <li>visiting home at weekends during an interim period (no more than 3 months) when the employee has started work in the new office but the permanent move (with family) has not yet been completed.</li> </ul>
Rent assistance for a maximum of 3 months for a second property.
Removal expenses, including: <ul style="list-style-type: none"> <li>utility disconnection and new connection fees; and</li> <li>insurance and/or maintenance on a property left empty for a maximum of 3 months.</li> </ul>
Professional fees, eg. solicitor or surveyor
Storage of furniture or personal belongings for a maximum of 3 months
Interest on a bridging loan for a maximum of 3 months
Stamp Duty and Land Registry fees
Cost of replacing domestic goods such as carpets and curtains which are unsuitable or unusable in the new home

4.5 All reimbursements listed above are free of income tax and national insurance (NI) contributions, therefore they are paid through Finance. Employees should discuss which costs may be eligible for reimbursement (within the £8,500 limit) with the Finance Team. For further information or clarification on tax and NI issues employees should contact the HR, People and Talent, Payroll and Pensions team.

4.6 All receipts and claims for financial support must be approved by the budget holder for the new location. In most cases this will be the relevant Executive Director.

4.7 The following relocation costs are NOT defined as having HMRC exemption tax and NI contribution exemption. These costs will NOT be reimbursed by PHSO:

- mortgage or housing subsidies;
- interest payments on a mortgage;
- redirection of mail;
- council tax bills;

- uniforms for children's new school;
- compensation for losses, such as giving up a part-used season ticket; and
- any compensation for the loss on the sale of the existing home.

4.8 Financial support is provided to employees on the basis that they will continue to be employed at PHSO for a period of at least two years from the date the last payment is made. PHSO will require the employee to repay relocation expenses if they leave PHSO for any reason other than redundancy, within that period. The schedule of repayments is as follows:

- within one year of the last relocation payment - 100% of all relocation expenses reimbursed; and
- after one year but within two years of the last relocation payment - 50% of all relocation expenses reimbursed.

These amounts will be deducted from the final salary made by PHSO. If there is further money owing then the employee should discuss the repayment with the Payroll Manager before they leave.

4.9 In addition to the financial support detailed above, an employee relocating permanently for business reasons is also eligible to take paid special leave as follows:

- preliminary visit(s) to the area with family - up to a maximum of 3 working days, in total; and
- time off for moving home - up to a maximum of 5 working days, in total.

## 5. Equality and Diversity

5.1 Where a post is moved to an alternative location for business reasons (business led), PHSO will consider whether additional financial and other support can be made available to an employee who requires adjustments to their property as a result of a disability.

5.2 The employee should make their request to their Executive Director who, in consultation with HR, People and Talent and the post's manager will reach a decision on whether additional financial or other support can be offered and the extent of this support.

## 6. Further sources of information and support

6.1 The employee will work with their new line manager, Service Delivery and Finance to gain practical assistance, to ensure, as far as possible, that the relocation process is carried out effectively.

6.2 Further information is also available at <http://www.hmrc.gov.uk/payee/exb/a-z/r/relocation.htm>

6.3 The following links provide useful information on a new neighbourhood. Please note that these are external links and PHSO can take no responsibility for the reliability or accuracy of the information contained in the websites.

[www.upmystreet.com](http://www.upmystreet.com)  
[www.childcarelink.gov.uk](http://www.childcarelink.gov.uk)  
[www.aboutmyplace.co.uk](http://www.aboutmyplace.co.uk)  
[www.helpiammoving.com](http://www.helpiammoving.com)  
[www.direct.gov.uk](http://www.direct.gov.uk) (in particular the Useful Contacts section on this site)