



# RELOCATION ASSISTANCE POLICY AND PROCEDURE

January 2020

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|                      |   |
|----------------------|---|
| Name of Policy:      | Relocation Assistance Policy and Procedure.       |
| Date Issued:         | January 2020                                      |
| Date to be reviewed: | Periodically or if statutory changes are required |

|   |   |                                     |
|---|---|-------------------------------------|
| <b>Policy Title:</b>                    | <b>Relocation Assistance Policy and Procedure</b>                                     |                                     |
| <b>Supersedes: (Please List)</b>        | Version 1   |                                     |
| <b>Description of Amendment(s):</b>     | Revised Policy for CCG employees<br>Updated to reflect IC – No change to review dates |                                     |
| <b>This policy will impact on:</b>      | All staff   |                                     |
| <b>Policy Area:</b>                     | HR  |                                     |
| <b>Version No:</b>                      | 1.1   |                                     |
| <b>Author:</b>                          | HR Policy Lead - adapted for local use by Hull ICB                                    |                                     |
| <b>Effective Date:</b>                  | January 2024  |                                     |
| <b>Review Date:</b>                     | 4 Years   |                                     |
| <b>Equality Impact Assessment Date:</b> | December 2019   |                                     |
| <b>APPROVAL RECORD</b>                  | SPF Sub Group   | 02.10.2019                          |
|   | SPF   | 16.10.2019                          |
|   | Governing Body  | 24/01/2020                          |
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|   | SLT Members Consultation:   | May 2019<br>Rem com –<br>01/07/2022 |



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## **1. INTRODUCTION**

- 1.1 NHS Humber and North Yorkshire Integrated Care board (the ICB ) recognises that in order to recruit the most appropriate staff it may be necessary to offer assistance with the costs of relocating. This Policy describes the eligibility for assistance and the procedure to follow to gain approval for relocation assistance to be offered to a new employee.
- 1.2 Relocation assistance should be viewed as a benefit and a part of the overall remuneration package offered to the successful applicant.
- 1.3 Each post will be considered on its own merits and applicants will not be automatically entitled to relocation assistance if the advert template/ approval form, doesn't stipulate that relocation assistance is to be offered.
- 1.4 If relocation assistance is not offered in the advertisement it will not be offered, unless there are exceptional circumstances and it is agreed with the appropriate Director.
- 1.5 This policy should be read in conjunction with [HM Revenue & Customs](#) (HMRC) regulations for further information and any personal impact.

## **2. SCOPE**

- 2.1 Relocation will be offered in cases where the ICB identifies there are difficulties to recruit to a particular post. In most cases this will likely be posts which are at a band 8 and above.
- 2.2 This policy should be read in conjunction with the Recruitment and Selection Policy Travel and Expenses policy together with Agenda for Change (AFC)

## **3. POLICY PURPOSE AND AIMS**

This policy aims to assist the ICB to recruit and retain staff as an employer of choice.

## **4. IMPACT ANALYSIS**

### **GDPR**

The ICB is committed to ensuring that all personal information is managed in accordance with current data protection legislation, professional codes of practice and records management and confidentiality guidance. More detailed information can be found in the ICBs Data Protection and Confidentiality and related policies and procedures.

### **4.1 Equality**

In applying this policy, the ICB will have due regard for the need to eliminate unlawful discrimination, promote equality of opportunity, and provide for good

relations between people of diverse groups, in particular on the grounds of the following characteristics protected by the Equality Act (2010); age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, and sexual orientation.

In developing this policy, an Equality Impact Analysis has been undertaken. The equality impact assessment highlights that staff with disabilities may incur additional relocation expenses. Reasonable adjustments will be considered based on individual need. All staff are in receipt of the same relocation assistance rates and we would expect employees to consider their own personal needs and plan so accordingly. However, if an employee is able to demonstrate that they have been unable to avoid an expense and it is related to a particular need, this will always be considered by their line manager, within HMRC regulations, and met with discretion. The Equality Impact Analysis is attached at Appendix 4.

The application of this policy will be monitored alongside recruitment monitoring data to ensure fair application.

## 4.2 **Bribery Act 2010**

The ICB has a responsibility to ensure that all staff are made aware of their duties and responsibilities arising from The Bribery Act 2010.

The Bribery Act 2010 makes it a criminal offence to bribe or be bribed by another person by offering or requesting a financial or other advantage as a reward or incentive to perform a relevant function or activity improperly performed. The penalties for any breaches of the Act are potentially severe. There is no upper limit on the level of fines that can be imposed and an individual convicted of an offence can face a prison sentence of up to 10 years.

For further information see <http://www.justice.gov.uk/guidance/docs/bribery-act-2010-quick-start-guide.pdf>.

If you require assistance in determining the implications of the Bribery Act please contact the Local Counter Fraud Specialist on telephone number 07872 988939 or email at [nikki.cooper1@nhs.net](mailto:nikki.cooper1@nhs.net).

Due consideration has been given to the Bribery Act 2010 in the development of this policy (or review, as appropriate) of this policy document and no specific risks were identified.

## 5. **NHS CONSTITUTION**

### 5.1 The ICB is committed to:

Designing and implementing services, policies and measures that meet the diverse needs of its population and workforce, ensuring that no individual or group is disadvantaged.

5.2 This Policy supports the NHS Constitution as follows:

The NHS aspires to the highest standards of excellence and professionalism in the provision of high-quality care that is safe, effective and focused on patient experience; in the planning and delivery of the clinical and other services it provides; in the people it employs and the education, training and development they receive; in the leadership and management of its organisations; and through its commitment to innovation and to the promotion and conduct of research to improve the current and future health and care of the population

## **6. ROLES / RESPONSIBILITIES / DUTIES**

### **6.1 Lead**

The relevant director must give authorisation to the recruiting manager for relocation assistance to be awarded.

### **6.2 Employees**

All staff are in receipt of the same relocation assistance rates and we would expect employees to consider their own personal needs and plan so accordingly.

### **6.3 Line Manager**

Recruiting managers are to decide prior to advertising whether relocation assistance will be offered to ensure that procedure is applied fairly and equitably. Relocation assistance can only be offered with the approval of the appropriate Director. The advertisement is to clearly state that the successful applicant would be eligible to claim for relocation assistance should they meet the criteria, to ensure that this policy is used fully as an aid to attracting and recruiting staff.

The recruiting manager must consider factors affecting the availability of suitable applicants and if they wish to offer relocation assistance they must state this on the advert template/ approval form. Advice and guidance is available from the Human Resources team.

## **7. ELIGIBILITY CRITERIA**

7.1 In order to be eligible for relocation support, the individual must live a minimum of 70 miles away from their contractual place of working

7.2 There may be exceptional circumstances where applicants do not fulfil the eligibility criteria yet the recruiting manager wishes to offer relocation assistance. The recruiting manager must then seek authorisation from the appropriate Director.

7.3 Only one set of payments will be made per household.

- Where a member of the employee's household is an employee of the organisation or another NHS employer, this must be declared and reimbursement will be restricted to one claim.



- Where a member of the employee's household is entitled to similar expenses from an external employer, this must be declared.
- The Director (following advice from Human Resources) will decide any reduction in expenses payable by the ICB in view of the expenses available from the external employer.

## 8. LEVEL OF ASSISTANCE

8.1 Relocation assistance will normally be paid to those who are eligible up to a maximum ceiling of £8,000. The level of assistance will depend on:

- the eligibility band within which the expenses fall (see below)
- budgetary constraints – a manager or Human Resources representative may specify a maximum amount to be allocated which may be less than that stated in the table below.

|               | Type of Move   | Expense Maximum |
|---------------|--|-----------------|
| <b>Band A</b> | Moves which do not involve the sale or purchase of a property              | Up to £3,000    |
| <b>Band B</b> | Sale of property only OR purchase of a property within the local area only | Up to £5,000    |
| <b>Band C</b> | Sale of a property and also purchase of a property within the local area   | Up to £8,000    |

8.2 The maximum amount to be claimed will be negotiated and agreed before the applicant commences employment with the ICB. The total amount to be paid should be justified in relation to labour market forces and this should be explicit and recorded by the recruiting manager.

## 9. COMPONENTS OF THE RELOCATION ASSISTANCE PACKAGE

9.1 It is the responsibility of the employee to comply with the HMRC rules and regulations applicable to relocation expenses. Additional information is available on the HMRC [website](#).

9.2 The relocation assistance package will consist of payments for reasonable expenses relating to the following components, up to the agreed maximum:

- the employee's sale of their current residence
- their purchase of a new residence
- transporting the employee's belongings to the new residence (cheapest of three quotes)

- associated travel and subsistence costs (see section 10)
- domestic goods for the new premises
- bridging loans

9.3 The relocation assistance claims must be deemed as reasonable by the recruiting manager and the recruiting manager taking workforce advise.

9.4 Invoices/bills should be paid by the applicant and expenses claimed retrospectively. All expenses reimbursed must be covered by original invoices/receipts.

## **10. TAX LIABILITY**

10.1 Under current tax rules removal expenses will not normally be subject to PAYE as long as:

- the total payment is below £8,000
- payments are supported by original receipts
- payments are deemed to be reasonable, see section 9.2

10.2 To be eligible for tax relief removal expenses must be paid before the end of the tax year following the one in which the employee starts their new job. Further information is available on the HRMC website.

## **11. EMPLOYEES NOT MAKING A PURCHASE**

11.1 For an agreed fixed period, a manager may offer to reimburse particular expenses where the new employee proposes to make arrangements which do not involve purchasing a property in the local area. Such expenses are subject to HMRC guidelines and may include reimbursement for temporary accommodation and continuing commitment costs incurred in their original property. Any such expenses will form part of the overall removal expenses package.

## **12. REMINBURSMENT OF TRAVEL EXPENSES**

12.1 In exceptional circumstances travel expenses may be paid for a limited period of time (maximum 1 year) when there is a commitment to move, but the move is delayed. Any travel costs reimbursed will form part of the overall removal expenses package and will be paid at the reserve rate. Employees may be asked to provide relevant documentation supporting their claim. Refer to Agenda for Change Handbook for further information.

## **13. CONDITIONS**

13.1 The ICB is committed to reimbursing legitimate claims that meet the criteria within this policy for removal expenses. Any claims found to have been falsified or inflated in any way will be referred to the Local Counter Fraud Specialist/NHS counter farud authority.

13.2 Any abuse of this policy will be investigated and may result in disciplinary action

being taken, see section 13.5 below.

- 13.3 Original receipts and invoices must be attached to any claims made in order for those claims to be processed, see Part 2 for procedure.
- 13.4 In view of the significant costs involved in providing relocation assistance any employee who resigns from their post within the first two years of commencing their appointment will be required to repay all or part of the money that they have received. The repayment would be based on 1/24 of the total amount paid by the ICB for each incomplete month within the first 24 months of employment. The sum must be repaid to the ICB no later than the final day of employment and will be deducted from the final salary payment. (Should this be insufficient to cover the outstanding debt the employee will reimburse the ICB immediately by some other means acceptable to the ICB).
- 13.5 If an employee has their contract terminated by the ICB (except on the grounds of Redundancy or Capability due to un-resolved Ill Health), they will be required to repay the whole amount of the financial support with no reduction.

#### **14. Part 2 PROCEDURE**

- 14.1 See Procedure Flowchart, Appendix 1
- 14.2 The Human Resources recruitment team will include a copy of the Relocation Assistance Policy and Application Form in the new starter pack for the successful candidate (where applicable).
- 14.3 Relocation assistance claims will be monitored by the budget holder and relevant management accountant.

#### **15. IMPLEMENTATION**

The implementation of this policy will be audited at appropriate intervals by the HR Team.

#### **16. TRAINING AND AWARENESS**

- 16.1 Policy available on website, further guidance is available from the HR tem

#### **17. MONITORING AND Effectiveness**

The effectiveness of this Policy will be monitored by Human Resources.

#### **18. POLICY REVIEW**

- 18.1 This Policy will be reviewed 4 years from the date of ratification, unless legislative changes require earlier. Where review is necessary due to legislative or HMRC

change, this will happen immediately.

## **19. REFERENCES**

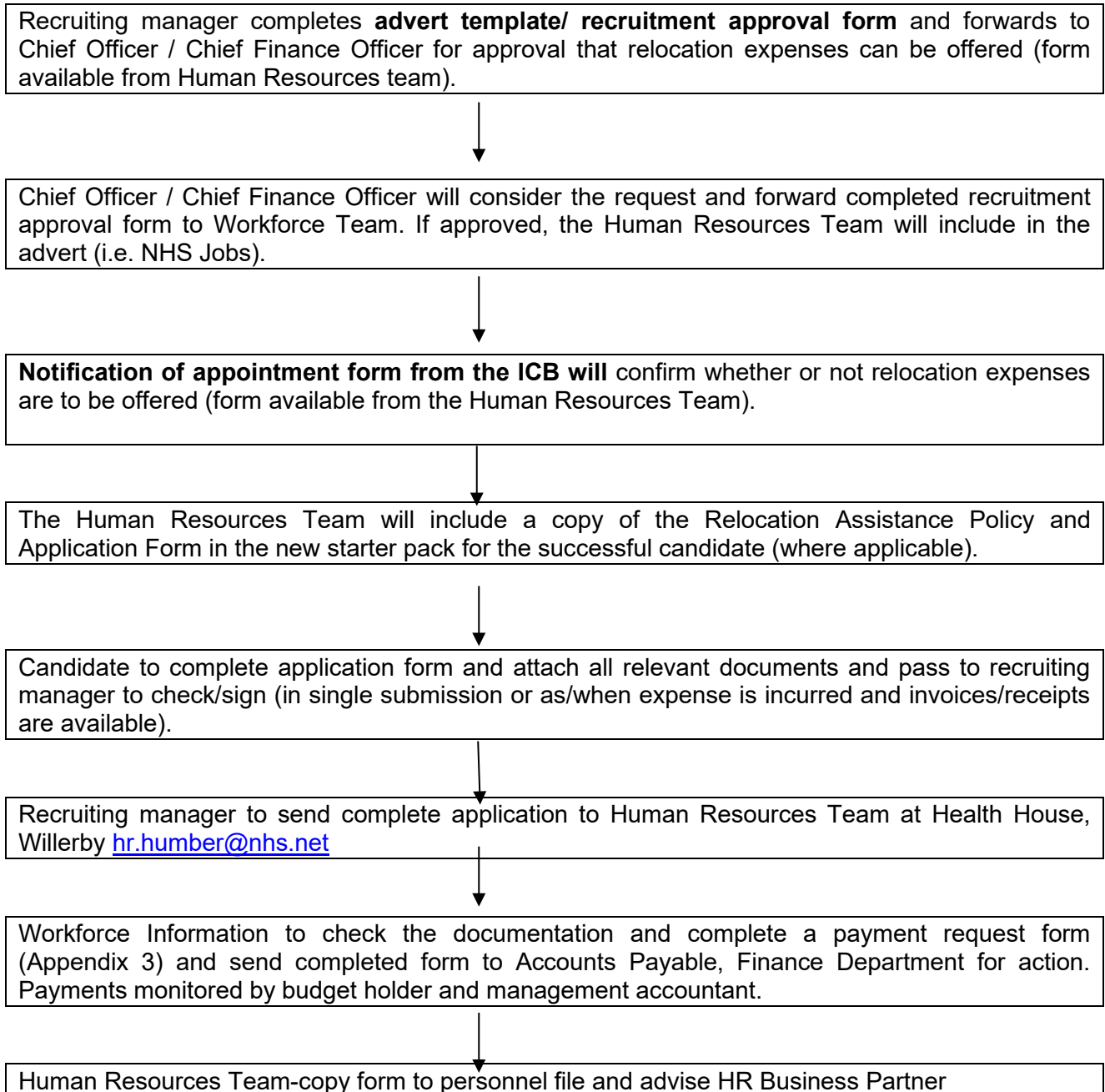
- HM Revenue & Customs (HMRC) at: <http://www.hmrc.gov.uk/>
- Recruitment and Selection Policy
- Travel and Expenses Policy
- NHS terms and conditions of service handbook

## **20. ASSOCIATED DOCUMENTATION**

- Recruitment and Selection Policy
- Travel and Expenses Policy
- Equality and Diversity Policy

## APPENDICES 1

### PROCEDURE FLOWCHART



## APPENDICE 2

### Relocation Expenses Application Form

#### Details of New Appointment

|                                 |  |
|---------------------------------|--|
| Name                            |  |
| Post                            |  |
| Job Reference No.               |  |
| Start Date                      |  |
| Permanent/Temporary Appointment |  |

**Tick the relevant box to determine the level of assistance for the application:**

|   |                                 |
|---|---------------------------------|
| Neither sale nor purchase of a property                             | Band A <input type="checkbox"/> |
| Sale of a property only   | Band B <input type="checkbox"/> |
| No sale - purchase of a property within the local area only         | Band B <input type="checkbox"/> |
| Sale of a property and purchase of a property within the local area | Band C <input type="checkbox"/> |

#### Address Details – if applicable

| Current Address | Proposed / New Address |
|-----------------|------------------------|
|                 |                        |

**Please list below the amounts you wish to claim and the elements of the criteria you wish to claim for:**

Initial Claim       Ongoing Claim

#### Declaration:

I wish to apply to Hull Clinical Commissioning Group for assistance with the relocation expenses actually and necessarily incurred by me in relocating to take up my new appointment. In doing so I declare that the information and expense details provided by me on and/or with this form are correct and that no other member of my household has received, or intends to claim for these expenses from another employer. I understand that if I provide false information I may be liable for disciplinary, prosecution and civil recovery proceedings. I consent to the information on this form being used for the purposes of the prevention, detection and investigation of fraud.

I understand that as a condition for making payment the ICB requires an undertaking that if I leave the ICB within a period of 24 months (see 13.5 conditions) I will voluntarily repay relocation expenses paid by the ICB. The repayment would be based on 1/24 of the total amount paid by the ICB for each incomplete month within the first 24 months of

employment and will be deducted from my final salary payment.

Signature of employee: .....

Date: .....

Signature of recruiting manager:.....

Date:.....

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**Workforce Information**

Recruitment approved by Hull ICB,

Name:.....Date.....

Payment request form sent to Accounts Payable – Date .....

Copy on personnel file – Date.....

HRBP advised – Name: .....Date.....





**APPENDICE3**

**Payment Request Form**

|   |
|---|
| Organisation Code: <b>03F</b>                     |
| Organisation Name: Humber and North Yorkshire ICB |

|                               |                                 |
|-------------------------------|---------------------------------|
| Payment Request Number: _____ | To be completed by Finance only |
|-------------------------------|---------------------------------|

**PAYMENT MUST NOT BE PROCESSED WITHOUT A NUMBER BEING COMPLETED**

Name of Payee

Payees Address

City

Postcode

Payment Details  Bank Name:  
 Sort Code:  
 Account Number:

Details of payment

**Original paperwork to be retained by the requestor.**

Amount  Date to Pay

VAT if applicable

TOTAL

COMPLETED BY \_\_\_\_\_ DATE \_\_\_\_\_

AUTHORISED BY (FINANCE STAFF) \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

POSITION IN AUTHORITY \_\_\_\_\_

|                  | Org | Cost Centre | Subjective | Analy sis 1 | Analy sis 2 | Analy sis 3 | AMOUNT |
|------------------|-----|-------------|------------|-------------|-------------|-------------|--------|
| FINANCIAL CODING |     |             |            |             |             |             | £      |
|                  |     |             |            |             |             |             | £      |

THIS CODING MUST BE COMPLETED BEFORE PAYMENT CAN BE MADE

|                                    |                                |
|------------------------------------|--------------------------------|
| SUPPLIER CODE <input type="text"/> | FOR COMPLETION BY FINANCE ONLY |
|------------------------------------|--------------------------------|

BUDGET HOLDER TO AUTHORISE IN ORACLE \_\_\_\_\_



## HR / Corporate Policy Equality Impact Analysis:

|  |  |
|--|--|
| <b>Policy / Project / Function:</b>  | Relocation Assistance Policy   |
| <b>Date of Analysis:</b>   | September 2019   |
| <b>Completed by:<br/>(Name and Department)</b>   | HR Department<br>Hull ICB  |
| <b>What are the aims and intended effects of this policy, project or function?</b>   | This policy aims to assist the Hull Clinical Commissioning Group (the ICB) to recruit and retain staff as an employer of choice.   |
| <b>Are there any significant changes to previous policy likely to have an impact on staff / other stakeholder groups?</b>  | <i>None identified</i>   |
| <b>Please list any other policies that are related to or referred to as part of this analysis</b>  | Recruitment and Selection Policy<br>Travel and Expenses Policy<br>Equality and Diversity Policy  |
| <b>Who will the policy, project or function affect?</b>  | Employees and members of the public.   |
| <b>What engagement / consultation has been done, or is planned for this policy and the equality impact assessment?</b>   | Consultation has taken with Trade Unions and staff <ul style="list-style-type: none"> <li>• SLT</li> <li>• ICB Employees</li> <li>• SPF Sub group</li> <li>• SPF</li> <li>• Governing Body (approval)</li> </ul> |
| <p><b>Promoting Inclusivity and Hull ICB's Equality Objectives.</b></p> <p>How does the project, service or function contribute towards our aims of eliminating discrimination and promoting equality and diversity within our organisation?</p> <p>How does the policy promote our equality objectives:</p> <p>1. Ensure patients and public have improved access to information and minimise</p> | <p>This Policy does not directly promote inclusivity, however it applies a framework to follow a clear process to ensure there are clear and auditable processes in the relocation of new staff</p>              |

|   |  |
|---|--|
| <p>communications barriers</p> <ol style="list-style-type: none"> <li>2. To ensure and provide evidence that equality is consciously considered in all commissioning activities and ownership of this is part of everyone's day-to-day job</li> <li>3. Recruit and maintain a well-supported, skilled workforce, which is representative of the population we serve</li> <li>4. Ensure the that NHS Hull Clinical Commissioning Group is welcoming and inclusive to people from all backgrounds and with a range of access needs</li> <li>5. To demonstrate leadership on equality and inclusion and be an active champion of equalities in partnership programmes or arrangements</li> </ol> |  |
|---|--|

| Equality Data   |  |
|---|--|
| <p><b>Is any Equality Data available relating to the use or implementation of this policy, project or function?</b></p> <p>Equality data is internal or external information that may indicate how the activity being analysed can affect different groups of people who share the nine <i>Protected Characteristics</i> – referred to hereafter as '<i>Equality Groups</i>'.</p> <p>Examples of <i>Equality Data</i> include: (this list is not definitive)</p> <ol style="list-style-type: none"> <li>1: Recruitment data, e.g. applications compared to the population profile, application success rates</li> <li>2: Complaints by groups who share / represent protected characteristics</li> <li>4: Grievances or decisions upheld and dismissed by protected characteristic group</li> <li>5: Insight gained through engagement</li> </ol> | <p>Yes <input checked="" type="checkbox"/></p> <p>No <input type="checkbox"/></p> <p>Where you have answered yes, please incorporate this data when performing the <i>Equality Impact Assessment Test</i> (the next section of this document). If you answered No, what information will you use to assess impact?</p> <p><b>Please note that due to the small number of staff employed by the ICB, data with returns small enough to identify individuals cannot be published. However, the data should still be analysed as part of the EIA process, and where it is possible to identify trends or issues, these should be recorded in the EIA.</b></p> |

## Assessing Impact

Is this policy (or the implementation of this policy) likely to have a particular impact on any of the protected characteristic groups?

(Based on analysis of the data / insights gathered through engagement, or your knowledge of the substance of this policy)

| Protected Characteristic:  | Neutral Impact: | Positive Impact: | Negative Impact: | Evidence of impact and, if applicable, justification where a <i>Genuine Determining Reason</i> <sup>1</sup> exists (see footnote below – seek further advice in this case) |
|--|-----------------|------------------|------------------|--|
| <p>It is anticipated that these guidelines will have a positive impact as they support policy writers to complete meaningful EIAs, by providing this template and a range of potential issues to consider across the protected characteristics below. There may of course be other issues relevant to your policy, not listed below, and some of the issues listed below may not be relevant to your policy.</p> |                 |                  |                  |  |
| <b>Gender</b>  | ✓               |                  |                  | The policy is consistent in its approach to relocation expenses regardless of the employee's gender  |
| <b>Age</b>   | ✓               |                  |                  | The policy is consistent in its approach to relocation expenses regardless of the employee's age   |
| <b>Race / ethnicity / nationality</b>  | ✓               |                  |                  | The policy is consistent in its approach to relocation expenses regardless of the employee's race / ethnicity/ nationality   |
| <b>Disability</b>  | ✓               |                  |                  | Higher costs of moving for disabled employees should be considered on a case by case basis in accordance with the duty to consider reasonable adjustments for              |

1. <sup>1</sup> The action is proportionate to the legitimate aims of the organisation (please seek further advice)

|  |   |  |  |   |
|--|---|--|--|---|
|  |   |  |  | disabled employees (or potential employees)   |
| <b>Religion or Belief</b>                | ✓ |  |  | The policy is consistent in its approach to relocation expenses regardless of the employee's religion or belief.                      |
| <b>Sexual Orientation</b>                | ✓ |  |  | The policy is consistent in its approach to relocation expenses regardless of the employee's sexual orientation                       |
| <b>Pregnancy and Maternity</b>           | ✓ |  |  | The policy is consistent in its approach to relocation expenses regardless of the employee's pregnancy or maternity status            |
| <b>Transgender / Gender reassignment</b> | ✓ |  |  | The policy is consistent in its approach to relocation expenses regardless of the employee's transgender / gender reassignment status |
| <b>Marriage or civil partnership</b>     | ✓ |  |  | The policy is consistent in its approach to relocation expenses regardless of the employee's marriage or civil partnership.           |

### **Action Planning:**

**As a result of performing this analysis, what actions are proposed to remove or reduce any risks of adverse impact or strengthen the promotion of equality?**

| <b>Identified Risk:</b> | <b>Recommended Actions:</b> | <b>Responsible Lead:</b> | <b>Completion Date:</b> | <b>Review Date:</b> |
|-------------------------|-----------------------------|--------------------------|-------------------------|---------------------|
| Higher costs of         | This should be considered   | Corporate                | Ongoing                 | Annually            |

|   |   |                   |         |          |
|---|---|-------------------|---------|----------|
| moving for disabled employees may be incurred   | on a case by case basis in accordance with the duty to consider reasonable adjustments for disabled employees (or potential employees).   | HR Lead           |         |          |
| As the policy is written in English there is a potential impact on employees who may have communication barriers. | The policy document includes an accessibility statement offering alternative formats on request.<br>The ICBs internal 'portal' and external website signpost individuals to alternative formats such as large print, braille or another language. | Corporate HR Lead | Ongoing | Annually |
|   |   |                   |         |          |

|  |
|--|
| <b>Sign-off</b>  |
| <b>All policy EIAs must be signed off by Mike Napier, Associate Director of Corporate Affairs</b>                    |
| <b>I agree with this assessment / action plan</b>  |
| <b>If <i>disagree</i>, state action/s required, reasons and details of who is to carry them out with timescales:</b> |
|                                   |
| <b>Signed:</b>   |
| <b>Date: 04.12.19</b>  |