Royal Berkshire NHS
NHS Foundation Trust

Relocation Policy (CG148)

Approval

Approval Group	Job Title, Chair of Committee	Date
Policy Approval Group	Chair of Policy Approval Group	March 2025

Change History

Version	Date	Author, job title	Reason
4.0	August 2016	Deputy Director of Workforce	Policy Review & Combining with Medical Staff Relocation Policy
5.0	January 2018	Deputy Director of Workforce	Policy Review
6.0	December 2019	Deputy Director of Workforce	Policy Review
6.1	November 2020	Deputy Director of Workforce	Updated in light of on-line system for claiming expenses
6.2	October 2022	Deputy Chief People Officer	Changes to eligibility
6.3	May 2023	Deputy Chief People Officer	Changes to eligibility
6.4	March 2025	Deputy Chief People Officer	Changes to eligibility

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The Royal Berkshire NHS Foundation Trust takes the handling and security of all data seriously and ensures it meets all current national data protection legislation. The policy is GDPR compliant.

1.0 Purpose

The Royal Berkshire NHS Foundation Trust recognises providing relocation support can be an integral part of the recruitment process and can be used as part of the overall employment package to ensure the appropriate people with the right skills are attracted and recruited to the Trust.

The purpose of the policy is to assist new employees by:

- Helping with the cost of moving home to take up a post within the Trust.
- Providing assistance to aid the temporary disruption to normal home life.
- Providing a relocation package which is fair and equitable.
- Ensuring the financial contribution to relocation package is reasonable, cost effective and based on business need.

The policy establishes guidelines and procedures for the reimbursement of reasonable eligible expenses for employees moving to take up employment within the Trust. The policy deals with the taxation implications of such reimbursements by the Trust, in order to ensure expenses are reimbursed in the most tax efficient manner for both the employee and the Trust.

The policy also sets out the position covering the employee's duty to refund a certain percentage of any relocation reimbursements on voluntarily leaving the Trust's employment, normally within a two-year time frame.

2.0 Scope

This policy applies to all prospective employees, including prospective Senior Medical and Dental staff, of the Royal Berkshire NHS Foundation Trust, who are eligible for assistance with their relocation expenses and who would need to move home as a result of taking up employment within the Trust.

The specific eligibility conditions are set out below and these conditions will form part of the employment offer to prospective employees.

This policy excludes Junior Doctors appointed on rotational training programmes, by the Oxford Deanery (NHS England – Thames Valley) or any other Deanery who are covered by a separate policy.

3.0 Roles and Responsibilities

3.1 Applicants:

- Must raise the request for relocation expenses immediately after offer of employment.
- Should not assume they will eligible for relocation support. Relocation assistance must be confirmed within 4 months of being offered the post.

- Applicants must disclose any other source of relocation support, including that paid to any other member of their household.

3.2 Employees

- Submit claims within 3 months of the expenditure being incurred.
- Must produce original receipts/documentation as proof of the actual expenses connected with their move before they are reimbursed. They will also need to include proof of sale and purchase of a property.
- Inform the Deputy Chief People Officer should their personal circumstances change as this can affect their eligibility for relocation expenses i.e. be unable to sell their original property.
- Ensure any application is in line with this policy.

3.3 Line Manager

- Ensure eligible staff are aware of the entitlement to claim relocation expenses.
- Review all claims and approve (at the first level) as appropriate before sending to the Deputy Director of Workforce.

3.4 Deputy Chief People Officer

- Review all claims and approve (at the second level) as appropriate before sending to Payroll for processing.

4.0 Definitions

4.1 Business Need

Where a post cannot be recruited to locally, and/or previous attempts to recruit have been unsuccessful, and/or a case can be made to demonstrate paying reasonable relocation expenses would be beneficial to the Trust. Where the post is deemed to be a hard to recruit post.

4.2 Direct Costs

Relocation expenses which are eligible for tax relief are currently up to a maximum of £7,600 in total. This is based on the current maximum tax free benefit at the time of issuing this policy.

4.3 Indirect Costs

Relocation expenses are not eligible for tax relief. Tax will be deducted at the normal rate of tax under the PAYE system.

4.5 Partner

The other member of a couple consisting of:

- A man and a woman who are not married to each other but are living together as if they were husband and wife, or

- Two people of the same sex who are not civil partners (or married to each other) but are living together as if they were civil partners (or married to each other)

4.6 Speciality/Staff Grade Doctors

Specialty/Staff Grade (SAS) Doctors will be entitled to full relocation support if employed on a substantive basis. Those employee on a fixed term basis will be entitled to 'lite' relocation support.

5.0 Eligibility Criteria for Relocation Support

The Trust has two levels of relocation support; 'lite' relocation support for clinical staff in bands 5-7 and SAS doctors and Consultants employed on and a fixed term basis and full relocation support for staff in Bands 8a and above and senior medical staff and SAS doctors employed on a substantive basis.

A Recruiting Manager may ask for relocation support in connection with a hard to recruit post. Such requests will need to be made to the Chief People Officer prior to the employee commencing in post.

5.1 'Lite' Relocation Support

The Trust offers 'lite' relocation support to clinical staff in bands 5-7 and SAS doctors and Consultants employed on a fixed term basis who move into the area to take up a post in the Trust. Reimbursement of up to a maximum of £1,600 of actual costs incurred related to the relocation against receipts submitted. (See Appendix 1 for expenses covered).

5.2 Full Relocation Support

Reimbursement of up to a maximum of £7,600 in total of actual costs incurred related to the relocation against receipts submitted and subject to the expenses categories. (See Appendix 1 for expenses covered)

If, in exceptional circumstances, more than £7,600 is agreed, any payments in excess of £7,600 are taxable at source.

5.3 Staff Relocating from Overseas

Staff relocating from overseas are able to claim for one standard class flight to the UK which will be paid by the Trust either directly or via our partner agencies. Travel arrangements must be agreed with the Trust prior to booking.

Staff in this category may also be eligible for 'lite' or full relocation support in addition. Where full relocation support is provided the cost of the flight will be deducted from the £7,600 limit.

5.4 Medical Staff

Medical staff who have on-call commitments must reside within a 10 mile radius, or 30 minute travelling time to their main place of work, as stated in the Terms and Conditions of Service, Section 12, paragraph 2, unless special permission is granted by the Medical Director.

6.0 General Principles

The following general principles are applicable:

- Requests for relocation support after the terms of the contract have been agreed should not normally be considered.

- The Trust must be the main or only employer.

- The new appointee must be actively seeking to sell their current property at a realistic market price.

- Relocation expenses will not normally be payable to an employee taking up post on a temporary contract for a year or less (except for SAS doctors and Consultants).

- For temporary contracts between one and two years, limited expenses may be payable at the discretion of the Chief People Officer.

- For SAS doctors and Consultants, who were originally employed on a temporary contract of a year or less, who would have already been entitled to 'lite' relocation expenses, they will be able to apply for full relocation expenses and this will be considered on a case by case basis.

- Employees voluntarily leaving the employment of the Trust within a period of two years from the date of commencement will be required to repay their expenses on the following scale:

  - up to 12 months employment with the Trust - 100% reimbursement.
  - 12 to 24 months employment with the Trust - 50% reimbursement.

- The Trust reserves the right to reclaim payments made to employees who fail to relocate within two years of their appointment date. In exceptional circumstances discretion over this period may be given with the approval of the Chief People Officer.

- Any outstanding relocation allowance not claimed within two years cannot be claimed.

- Staff will be reimbursed on production of proof of sale and purchase of a property.

- Eligible expenses will only be reimbursed on production of supporting paid and receipted invoices carrying a VAT number (this allows the Trust to reclaim VAT), and subject to the agreed maximum.

- In exceptional circumstances the Remuneration Committee can agree reimbursement of more than £7,600, but this will then be subject to tax at the current rate.

- Employees should obtain two quotes from removal firms and the lowest cost quote will be refunded, individuals may choose a more expensive option but they will need to pay the excess.

- Employees should move to within a 30 mile radius of their main place of work or have no more than a 1 hour journey to work in order to apply for relocation expenses.

- Employees will be expected to move a minimum of 10 miles closer to their main place of work or reduce the travelling time to work by 30 minutes in order to be eligible for relocation assistance.

7.0 Procedure for Claiming Expenses

The member of staff should submit the Application for Relocation Support Form on appointment (in Appendix 2). Once the application has been approved the member of staff will be sent guidance on how to access and claim reimbursement via the Trust's online expenses system by the Head of Payroll Services.

8.0 Appeals Procedure

If an employee feels they have been treated unfairly in relation to relocation expenses provisions, they should raise their concern with the Director of Workforce.

9.0 Consultation Undertaken

This policy has been reviewed by Human Resources and Payroll. The policy has been subject to consultation with Staff Side through the Joint Negotiating Committee.

10.0 Dissemination/Circulation/Archiving

The Deputy Chief People Officer is responsible for the dissemination of this policy. This policy will be available to all employees via the intranet.

The Trust Secretary will be responsible for archiving old versions of this document.

11.0 Implementation

The effective date of this policy is the date of ratification.

12.0 Training

There is no mandatory training associated with this procedure. If staff have any queries about its operation, they should contact the policy owner/author.

13.0 Monitoring of Compliance

Aspect of compliance or effectiveness being monitored	Monitoring method	Individual or dept. responsible for the monitoring	Frequency of the monitoring activity	Group/committee which will receive the findings/ monitoring report	Committee/ individual responsible for ensuring that the actions are completed
Temporary accommodation provided by the Trust for overseas nurses	HR to provide Payroll with report.	Head of Payroll to review and declare any "Benefits in Kind"	Annually		
Appropriate documentation provided prior to reimbursement	Appointment and Claim forms to be submitted by employee	Head of Payroll	Application Form on appointment Claim Form with each claim		

The Trust reserves the right to amend its monitoring requirements in order to meet the changing needs of the organisation.

14.0 Supporting Documentation and References

Terms and Conditions – Consultants (England) 2003.
General Council Conditions of Service, Section 26.
Terms and Conditions of Service NHS Medical and Dental Staff (England) 2002.

15.0 Equality Impact Assessment

Stage 1: Screening

Part 1: Initial Scoping
For each of the nine protected groups identified in the table below, respond to the identified questions with a Yes (Y); No (N); or Unclear (U)

	Age	Sex	Disability	Race	Gender Reassignment	Religion or Belief	Sexual Orientation	Marriage and Civil Partnership	Pregnancy and Maternity
Do different groups have different needs, experiences, issues and priorities in relation to the proposed policy/change proposal?	N	N	N	N	N	N	N	N	N
Is there potential for or evidence that the proposed policy/change will not promote equality of opportunity for all and promote good relations between different groups?	N	N	N	N	N	N	N	N	N
Is there potential for or evidence that the proposed policy will affect different population groups differently (including unintended discrimination against certain groups)?	N	N	N	N	N	N	N	N	N
Is there public concern (including media, academic, voluntary or sector specific interest) in potential discrimination against a particular population group or groups?	N	N	N	N	N	N	N	N	N

Part 2: Evidence and Feedback that has informed your analysis

Please identify below the data, information or feedback that you have drawn on to reach the conclusions above. This will be information that has enabled you to assess the actual or potential impacts in the context of the key needs to **eliminate unlawful discrimination**, **advance equality of opportunity** and **foster good relations** with respect to the characteristics protected by equality law. These sources could include:

- Equalities monitoring information of staff/service users affected by the identified provision/policy etc.
- Engagement (internal/external or both) with or feedback from relevant stakeholders e.g. staff; patient groups, commissioners, external agencies.
- Staff Survey Data; Patient Survey Data etc.
- Research or information available relative to the identified protected group.
- Project leads professional knowledge of the issues the policy/change is seeking to enact.

It is not anticipated that this policy will adversely affect any of the individuals in the nine protected characteristics.

If the analysis under Part 1 has concluded that there are equality impacts or that the impacts are unclear (i.e. you responded 'Yes' or 'Unclear' in Part 1), **please move on to Part 4 of the assessment**. If no equality impacts are identified, **please move on to Part 3 below** to conclude the assessment

Part 3: Narrative
If you have concluded there are no equality impacts related to the policy/provision, please provide a brief narrative to explain why you have come to this conclusion:

No areas of concern have been raised to date. This will be subject to review.

If no equality impacts have been identified, this concludes the equality impact assessment. Please complete the declaration below:

Based on the information set out above I have decided that a full equality impact assessment is (please delete as appropriate): Not necessary.

APPENDIX 1

EXPENSES COVERED

Sale Expenses – up to £2,000
(Applicable to homeowners in receipt of full relocation support)

Legal Fees and Services
Estate Agent Fees
Legal costs of an aborted sale

Purchase Expenses – up to £4,000
(Applicable to homeowners in receipt of full relocation support – not applicable to first time buyers)

Legal Fees and Services
Stamp Duty (or an element thereof) and Land Registry Fees
Structural Surveys and Valuations
Costs of an aborted purchase

In the case of an abandoned purchase, in circumstances outside of the individual's control, fees will be met for a maximum of 2 aborted purchases, subject to the agreed maximum. The Trust will reimburse expenses under this section which relate to a property comparable to that which was owned at the previous location. The Trust reserves the right to undertake its own valuation where there is a significant difference in the size of the old property and the size of the new, and to reduce expenses accordingly.

Moving Expenses – up to £600
(Applicable to eligible homeowners and non-homeowners)

All expenses directly related to transportation of furniture and effects including:

Moving Costs (including packing and unpacking)
Temporary Storage Costs (up to a maximum of 3 months)
Insurance to cover goods in transit or temporary storage
Removing and refitting of domestic goods
Family travel when the actual move takes place

Temporary Expenses – up to £1,000
(Applicable to eligible homeowners and non-homeowners)

Family travel for visits to the new location
Travel between your old home and temporary accommodation
Temporary rented accommodation (this may be taxable depending on the circumstances)

APPENDIX 2

Royal Berkshire NHS Foundation Trust
Application for Relocation Support

Please complete this form as soon as possible on appointment and return to your line manager for authorisation. These details are required to assess your eligibility for relocation support. If you qualify for relocation support you will be able to claim via the on-line expenses system.

Please print in block capitals and complete all parts of the form

Surname:	**Forenames:**
Current address:	
Is this address temporary or permanent? If temporary, please state circumstances	
Preferred contact telephone number:	

Employment	**Current Employment**	**Previous Employment**
Hospital		
Department		
Job Title		
Grade/Band		
Full/Part Time (sessions/hours)		
Start Date		
Term of Appointment		To: From:

Type of accommodation occupied (tick appropriate box)	**Current (New)**	**Previous (Old)**
Rented Accommodation		
Owner Occupied		

I (name) …….. hereby make a formal application for assistance towards removal expenses actually and necessarily incurred by me.

I agree that in consideration of receiving such removal expenses as may be paid under the current regulations in consequence of moving my home.

Employee Declaration:

I confirm that:

- the Trust is my main or only employer
- I have not claimed removal and associated expenses within the last 2 years
- the removal and associated expenses incurred will not be recovered in full, or part, from another source
- I am employed on either a substantive basis or a temporary contract of more than 1 year
- if I voluntarily leave the Trust within a period of two years from the commencement I will be required to repay expenses on the following scale:
    - up to 12 months' employment with Trust – 100% reimbursement
    - 12 to 24 months' employment with the Trust – 50% reimbursement

I understand that the expenses to be claimed are admissible under the current Trust Relocation Policy.

I, the under signed agree, to the terms of this relocation package.

Claimant Signature:	Date:

I, the under signed approve this claim for relocation assistance.

Line Manager Signature:	Date:

I, the undersigned approve this claim for 'Lite' or 'Full' (delete as appropriate) relocation assistance	
Deputy Chief People Officer Signature:	Date: