

# Staff Handbook

## Chapter 14

# Relocation

### PERMANENT TRANSFER ALLOWANCES

**[SEE STAFF NOTICE 22 - RELOCATION EXPENSES REGARDING CHANGES FROM 1 JULY 2005 AND CONTACT HR SERVICES FOR MORE INFORMATION]**

14172 -14207 Unallocated.

#### Re-employment after retirement

14208 The following arrangements apply to staff who have either been re-employed after retirement at age 60 and who are subsequently transferred, or who were receiving transfer allowances immediately before retirement and are retained at the same station afterwards.

14209 If there is a break in service between retirement and re-employment, then the individual will be dealt with as having been reinstated. Payment of any allowances in issue under the rules governing 'Reimbursement of expenses incurred on transfer' at the date of retirement will not be resumed. If the staff are re-employed at an office other than that from which they retired, they will not be dealt with as transferred in the interests of the Commission.

14210 If there is no break in service between the individual's retirement and re-employment full time, payment of any transfer allowances in issue at the date of retirement may continue. If however, retention is in a lower grade, the rate of all allowances other than additional housing cost allowance will be related to the salary of the lower grade. No account will be taken of any pension received. Additional housing cost allowance will not be re-calculated but any such allowance in payment will be allowed to run on, subject to the rules, until it expires whether by the lapse of time or because the individual is permanently transferred to another station in circumstances justifying the payment of removal expenses.

14211 The following are regarded as being in the interests of the Commission:

either:

a. The transfer of staff who retire on age grounds at their own wish;

or

b. The transfer of staff who are retired at the instigation of the Commission and are offered re-employment in a lower grade because employment in that grade at their old station would be undesirable.

14212-14217 Unallocated.

### EXCESS FARES ALLOWANCE (EFA)

#### EFA for staff who do not move home

14218 Staff who are permanently transferred and who do not move home because the distance involved does not justify payment of removal expenses, may be eligible for an excess fares allowance (EFA) for the reasonable extra costs of their new home to office journey. The allowance is subject to tax and national insurance charges and will be payable for 3 years. Where EFA is based on quarterly or annual season tickets for travel by public transport, it remains payable during authorised absences of 3 weeks or less. But if it is

assessed at daily rates, under the exception mentioned in paragraph 14201, no reimbursement may be made during periods of absence. Exceptionally excess fares may be payable for up to 5 years. Again this allowance is subject to tax and national insurance charges.

14219 For all transfers the EFA payable is the amount by which the cost of the individual's home-to-office journey after the transfer exceeds the cost of the home-to-office journey before transfer.

14220 For staff travelling by public transport, assessment of the cost of the respective home-to-office journeys will be based on bus fares or standard class rail fares at annual or quarterly season ticket rates.

14221 Exceptionally, if such fares are either unavailable, or are uneconomic because of the nature of the member of staff's duties, then the excess will be based on daily, weekly or monthly rates as appropriate. If such an exception is granted, reimbursement of fares may be made only on days where the expense is actually incurred. Usually the amount of the allowance will only change as part of the Forestry Commission's annual review of travel and subsistence. It will not otherwise be re-assessed, eg following any change in fares at either the old or the new station, unless:

- a. the individual is subsequently transferred on public interest terms, in which case re-assessment will be based on the fares current at the date of transfer; or
- b. the individual moves home for any reason other than a compulsory transfer, in which case the re-assessment will be based on the fares which are current at the time of the original transfer. The allowance cannot, however, be increased in these circumstances.

14222 EFA is calculated on the basis of the actual cost of the journey at the old station and the most cost effective and reasonable means of travel at the new station. For example, if the journey at the old station was by public transport and the journey at the new station is by car, the calculations may be based on these costs if this is clearly the cost effective means of travel.

#### **Travel by private motor vehicle**

14223 The excess will be calculated on the same basis as for a journey by public transport unless the journey would be exceptionally difficult by that means. In such circumstances, the public transport rate of mileage allowance may be paid if this is more favourable to the member of staff. Where such exception is granted, reimbursement may be made under the normal rules, only on days when such expense is actually incurred, and the rate should be adjusted whenever the public transport rate of motor mileage allowance is revised.

#### **Staff who subsequently decide to move home**

14224 Staff who choose to receive excess fares and not removal expenses may, within 3 months of the date of transfer, change their mind. But the total excess fares paid will be recovered from their salary when the transfer grant is paid, if the member of staff moves home to the new station at public expense. Recovery of any tax paid on excess fares will be a match for the individual to pursue with Inland Revenue. If the member of staff receives excess fares as a lump sum (under paragraph 14226), use of this option will be subject to approval by Personnel Services.

#### **Further moves: effect on EFA**

14225 When an individual is re-transferred whilst in receipt of excess fares allowance, the allowance will be recalculated on the basis of the new fares over the original fares for the remainder of the initial 3 or 5 year cycle. At the end of this period, staff may begin a further period of EFA eligibility, finishing 3 or 5 years from the date of the subsequent transfer. During this subsequent period, EFA will be based upon the excess of the new fares over the current fares from home to the intermediate station.

#### **Payment of excess fares as a lump sum**

14226 The Commission has discretion, exceptionally, to pay EFA as a single lump sum at the date of transfer. Such a payment will be an advance of EFA and will therefore be recovered if, for example, the

member of staff ceases to be a civil servant. It will be necessary for the member of staff to sign an undertaking to repay the appropriate proportion of the allowance outstanding net of tax. No compensation will be made for any adverse effects, eg on the member of staff's tax position, as a result of payment as a lump sum. Members of staff are advised that tax is likely to be deducted at a higher rate particularly when EFA is paid at or near the start of a new tax year. The Commission will decide whether to pay a lump sum, and under what conditions.

### **Accommodation Costs**

14227 In some cases, staff who have opted to receive EFA rather than move home choose to spend a few nights a week in accommodation at the new permanent station rather than travel daily. In the past, such staff have been eligible for EFA only in respect of journeys actually made. In certain cases, it may be permissible to contribute towards the costs of such accommodation, within the limit of the EFA, which would otherwise be payable. You should contact your Local Personnel Section for further information if you wish to stay overnight rather than receive EFA.

### **EFA for members of staff who move home at public expense**

14228 In exceptional cases, the Commission may make some payment towards a member of staff's additional costs, within the limits of the EFA scheme, where the individual faces a substantial increase in outgoings on moving home and has to cope with an increase in commuting costs. It is envisaged that discretion will only be used where, for example, a member of staff moves to a cheaper area which is some distance from the new place of work, and result in consequent savings in the amount of Additional Housing Cost Allowance or salary advance required.