



**Isle of Man  
Government**

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# Relocation Expenses Scheme

Department of Education and Children  
*Rheynn Ynsee as Paitchyn*

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## Department of Education and Children

### Relocation Expenses Scheme

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## **RELOCATION EXPENSES SCHEME**

### **1. Scheme Objective**

To provide financial assistance towards the cost of relocating from the UK to the Island to those staff who are not normally resident in the Isle of Man and are appointed to a position within the Department of Education and Children.

This Scheme supersedes all previous schemes and does not extend to Civil Service appointments, which are subject to the Relocation Expenses Scheme administered by The Personnel Office of Isle of Man Government on behalf of Government Departments.

### **2. Eligibility to Claim**

All staff on permanent appointments or a fixed term of 3 years or more are entitled to apply ***providing they are not classed as ordinarily resident on the Isle of Man.***

*Exclusions:*

- The Department scheme does not apply to those staff appointed on a fixed term of less than 36 months, and is applied pro-rata for part time appointments. However, applications may be considered by headteachers on a discretionary basis.
- An employee is unable to claim relocation expenses, including housing assistance, if their spouse or partner has already received expenses or assistance from the Department of Education and Children or another Government Department.

Applications to claim assistance must be submitted to the Department within the first year of appointment. For example:

If an employee is appointed from 1 September 2010, his/her application must be received by the Department before 31 August 2011.

### **3. Undertaking**

The Scheme is subject to the requirement that a member of staff granted assistance under the Scheme must sign an undertaking to repay all or part of the assistance granted in the event of resignation or dismissal, for reasons other than health, from the Department within 3 years of taking up the appointment. If the appointment is not taken up, repayment will be in full.

Wherever possible any repayment will be deducted (with the employee's permission) from salary prior to the employee leaving the Department.

### **4. Applications**

Applications for assistance should be made on the appropriate form (see Appendices) and should be accompanied by the necessary receipts and other documents. They

should be forwarded, in the first instance, to the School/Service/IOM College to which the recruit has been appointed.

The form of undertaking should be submitted with the first application and will apply to all future claims for assistance made under this Scheme.

## **5. Pre-Employment Visits**

The scheme provides the following assistance, after the post has been accepted but before the appointment is taken up:

### **i. Preliminary Visit**

An allowance of up to £250 each for the recruit and his/her partner and £125 each for up to 2 dependant children towards the cost of travel to the Island to view housing.

### **ii. School/Service/College Visit**

An allowance of up to £75 per night for accommodation (for a maximum of 2 nights) in addition to the return fare from the recruit's home to the Island to visit the place of the appointment.

### **iii. Combined Preliminary and School/Service/IOM College Visit**

An allowance of up to £325 each for the recruit and his/her partner and £140 each for up to 2 dependant children towards the cost of travel and accommodation for a visit to the Island to view housing and for the recruit to visit the place of appointment.

#### **Note:**

The allowances for a preliminary visit and a School/Service/IOM College visit undertaken on different dates may be claimed separately. Where the visits are combined only 1 application form need be submitted.

## **6. Removal Expenses**

The Department will meet 70% of the expenses necessarily incurred in transporting the recruit, their partner and any dependant children and their personal, household and other effects, including one motor vehicle, to the Isle of Man.

(A dependant child is defined as a child in full-time education and under the age of 19 when the recruit takes up the appointment).

#### **Notes:**

- Where a private removal firm is to be used, **2 or more** estimates must be submitted, at least one of which should be from an Isle of Man based firm, and any assistance will be calculated on the lowest of these.
- It is the policy of the Department to make payments only on submission of a receipted invoice from the removal firm. Therefore, in order for reimbursement of the removal expenses to be arranged, it is necessary for the recruit to forward all

receipts, vouchers, etc in support of the application, in addition to the estimates that have been obtained.

- Claimants may carry out the removals themselves, provided quotes are supplied. Reimbursement will be up to the maximum of the lower quote.

## **7. Furniture Storage**

The Department will meet 70% of the cost of storing the recruit's furniture for a maximum of 13 weeks during their move to the Island. Granting of assistance will be subject to the production of receipts.

## **8. Housing Assistance**

The Scheme will provide financial assistance towards accommodation costs for staff that are appointed by the Department, providing they are not classed as ordinarily resident on the Isle of Man, are relocating to the Isle of Man and, as a result, are incurring higher property costs on the Island.

- i. Where the recruit has a UK mortgaged property, which is for sale and for which no rental income is received, and is paying either rent or mortgage on an Isle of Man property, assistance to a maximum of £500 per month for a maximum of 2 years may be granted.

Where rental income is received from the UK property, the assistance payable will be less the rental income received.

Where rental income previously received on the UK property ceases, but the property remains for sale, the full amount of assistance may be re-instated.

Where the recruit's UK property is sold within the two-year period of assistance, the assistance may be re-assessed on the basis of rent assistance to a maximum of £200 per month.

- ii. Where the recruit previously rented a UK property immediately prior to relocation and is paying either rent or mortgage on an Isle of Man property, assistance to a maximum of £200 per month in respect of the increase in rent/mortgage for a maximum of 2 years may be granted.
- iii. Where a newly qualified teacher appointed to the Department's staff previously lived in student accommodation or with parents in the UK, is paying either rent or mortgage on an Isle of Man property and provides evidence of the former rental costs involved, assistance to a maximum of £200 per month for a maximum of 2 years may be granted.

(Examples of the calculations of payments are provided on page 6)

## **Payment of Housing Assistance.**

Payments will be made on a monthly basis with normal salary for a maximum of 2 years. Such payments will not be liable to Superannuation, Income Tax or National Insurance deductions at source. Staff will, however, be required to declare the full amount of any housing assistance received as a 'benefit in kind' on their Tax Return form each year.

To assist employees in receipt of housing assistance in completing their Tax Return forms accurately, at the end of the financial year, the Finance Division will issue T9 forms detailing the amount of assistance received. Copies of these forms will also be sent to the Income Tax Division of Treasury.

## **Review**

A member of staff who is receiving Housing Assistance will be required to sign a periodic declaration confirming the actual costs involved and all other relevant information and agreeing to notify the Department of any change in circumstances. Failure to provide timely notification of changes may lead to the withdrawal of assistance.

## **9. Examples of the Calculation of Payments made under the Housing Assistance Scheme:**

### **i. Example A – Member of staff still paying a UK mortgage.**

A member of staff has a UK mortgaged property which is for sale and for which no rental income is received and is paying either rent or mortgage on an Isle of Man property.

- UK mortgage is £400 per month
- Isle of Man rent/mortgage is £550 per month
- Housing assistance of £400 per month, the lower figure may be granted.
- The assistance will be paid whilst the UK property remains unsold or up to a maximum of 2 years, whichever is the earlier. The member of staff will be required to provide proof that efforts are being made to sell the property and of the actual mortgage/rent payments made.
- Should the property be sold within the two-year period then the assistance for the balance of the period will be calculated using the method outlined in example B, with the maximum payment being £200 per month.

### **ii. Example B – No UK property but the member of staff has higher accommodation costs on the Island.**

A member of staff who previously rented a UK property for £450 per month immediately prior to relocating to the Island and is now either paying rent or mortgage on an Isle of Man property of £600 per month.

- An allowance of £150 per month calculated on the difference between the two costs, may be granted.

- The maximum amount which may be paid in these circumstances is £200 per month for a maximum of 2 years.

**iii. Example C – Newly qualified teachers and staff in special circumstances.**

A member of staff has previously lived in student accommodation, or with parents, the rental costs involved (evidence of costs to be provided) valued at £200 per month and is now either paying rent or mortgage on an Isle of Man property of £600 per month.

- An allowance of £200 per month, the maximum amount which may be paid in these circumstances, for a maximum of 2 years.

DEPARTMENT OF EDUCATION AND CHILDREN  
RELOCATION EXPENSES SCHEME

<b>NAME</b>	.....	
<b>ADDRESS (including postcode)</b>	..... ..... .....	
<b>Name of School/Service/IOM College visited</b>	.....	
<b>Date of Leaving UK</b>	.....	
<b>Date of Return to UK</b>	.....	
<b>EXPENSES INCURRED</b>		
<b>Boat Fare/Air Fare</b>		£.....
<b>Rail Fare(s)</b>	From: ..... To: .....	£.....
<b>Buses/Taxis</b>	From: ..... To: .....	£.....
<b>Car Mileage</b>	.....	
<b>Engine Size</b>	.....cc (PTO)	£.....
<b>Accommodation (max. 2 nights)</b>		
<b>At .....</b>	Date(s).....	£.....
<b>At .....</b>	Date(s).....	£.....
	<b>TOTAL</b>	£.....
<b>Signature of Claimant</b>	.....	
<b>Date</b>	.....	
<b>Signature of Headteacher/Head of Service/Principal IOM College</b>	.....	



<b>Date</b>	.....	
<b><i>FOR OFFICE USE ONLY</i></b>		
Total Claim	£.....	
Amount Payable	£.....	
Passed for Payment	.....	
Print Name	.....	

**DEPARTMENT OF EDUCATION AND CHILDREN  
RELOCATION EXPENSES SCHEME  
REMOVAL EXPENSES CLAIM FORM**

<b>NAME</b>	.....	
<b>ADDRESS (including postcode)</b>	..... ..... .....	
<b>Address, including postcode, to send cheque if different from above:</b>	..... ..... .....	
<b>Post</b>	.....	
<b>School/Service/IOM College</b>	.....	
<b><i>EXPENSES CLAIMED</i></b>		
<b>Removal expenses, excluding storage</b>		£.....
<b>Storage</b>		£.....
<b>Travel costs for postholder, partner and dependants</b>		£.....
<b>Vehicle cost (1 only)</b>		£.....
	<b>TOTAL</b>	£_____
<b>Signature of Claimant</b>	.....	
<b>Date</b>	.....	
<b>Signature of Headteacher/Head of Service/Principal IOM College</b>	.....	
<b>Date</b>	.....	

<b>FOR OFFICE USE ONLY</b>		
Total Claimed	£.....	
70% of claim	£.....	
Date Passed for Payment	.....	
Authorised by	.....	

**DEPARTMENT OF EDUCATION AND CHILDREN**  
**RELOCATION EXPENSES SCHEME**  
**APPLICATION FOR HOUSING ASSISTANCE**

<b>Part 1 of 2</b>	
<b>PERSONAL DETAILS</b>	
<b>Name:</b>	.....
<b>Date of Appointment</b>	.....
<b>Post:</b>	.....
<b>Type of Contract – Permanent/Limited Term (if Limited Term please state number of months)</b>	.....
<b>School/Service/IOM College</b>	
<b>Amount of Relocation Grant Awarded:</b>	£.....
<b>About your Accommodation on the Isle of Man</b>	
<b>Address (including postcode)</b>	..... ..... .....
<b>Is this accommodation rented or owned?</b>	.....
<b>Amount of rent/mortgage per month</b>	.....
<b>About your Previous Accommodation in the UK</b>	
<b>Address (including postcode)</b>	..... ..... .....
<b>Was this accommodation rented or owned?</b>	.....
<b>Amount of rent/mortgage per month</b>	.....

<b>If the UK property is still owned by you, please also answer the following questions:</b>	
<b>Do you receive any rental income and, if so, how much per month?</b>	£.....
<b>If the property is for sale, please state:-</b>	
<b>a) How long the property has been for sale</b>	.....
<b>b) The current sale price</b>	.....
<b>c) How the property is being advertised</b>	.....
<b>Please provide a copy of the estate agents' contract or other information to confirm that the property is being actively marketed.</b>	
<b>If the property is not for sale, please explain your intentions with regard to the property.</b>	..... ..... .....
<b>Part 2 of 2</b>	
<b>Please detail any other information which is relevant to your application for Housing Assistance.</b>	
_____	
_____	
_____	
<b>Amount of Housing Assistance claimed (per month)</b>	£.....

The completed form should be forwarded to your Headteacher/Principal of the UCM for countersigning.

Please ensure that you have submitted the documents relating to your accommodation costs, both in the UK and on the Isle of Man. This may include a rental contract, certified copies of mortgage agreements (UK and IOM where appropriate) and estate agents' contracts.

You should also ensure that you have read and understood the provisions of the Housing Assistance Scheme before submitting this application. Any queries should be directed to the Headteacher/Principal of the UCM or the Finance Division of the Department of Education and Children, Hamilton House, Peel Road, Douglas, IM1 5EZ.

**DECLARATION**

I can confirm that I have read and understood this form and that the information which I have provided is true and correct. I understand that, should any of the details change which may affect the amount of assistance paid, I must inform the Finance Division within 5 working days and that failure to do so may result in the assistance being permanently withdrawn and any overpayment being fully recoverable.

Signed:.....Date: .....

Countersigned: ..... Date: .....  
Headteacher/Principal UCM

DEPARTMENT OF EDUCATION AND CHILDREN  
RELOCATION EXPENSES SCHEME

FORM OF UNDERTAKING – PERMANENT CONTACT

I .....having been appointed initially to the post  
of .....  
at.....School/UCM for the Department of Education and  
Children with effect from ..... **HEREBY CERTIFY** that I am  
entitled to claim financial assistance in accordance with the Department’s Relocation  
Expenses Scheme.

**IN CONSIDERATION** of the Department granting me financial assistance towards the cost  
of relocating to the Isle of Man, I **UNDERTAKE** that if within 3 years of the date of my  
appointment to the above post, I either resign from the Department for reasons other  
than my health, or am dismissed from such Department, I shall repay to the Department  
the proportionate amount of the total assistance advanced to me calculated in the  
manner provided:

- If leaving within 1 year – 100% refund
- If leaving between 1-2 years – 50% refund
- If leaving between 2-3 years – 24% refund

I confirm that I have read and understood the current Relocation Expenses Scheme.

Given under my hand this..... day of .....201

Signed.....

Signature of Witness.....

Occupation .....

DEPARTMENT OF EDUCATION AND CHILDREN  
RELOCATION EXPENSES SCHEME

**FORM OF UNDERTAKING – LIMITED TERM CONTACT (12 MONTHS)**

I .....having been appointed initially to the post  
of .....

at.....School/UCM for the Department of Education and  
Children with effect from ..... **HEREBY CERTIFY** that I am  
entitled to claim financial assistance in accordance with the Department’s Relocation  
Expenses Scheme.

**IN CONSIDERATION** of the Department granting me financial assistance towards the cost  
of relocating to the Isle of Man, I **UNDERTAKE** that if within 1 year of the date of my  
appointment to the above post, I either resign from the Department for reasons other  
than my health, or am dismissed from such Department, I shall repay to the Department  
the proportionate amount of the total assistance advanced to me calculated in the  
manner provided:

- If leaving within 1 year – 100% refund

I confirm that I have read and understood the current Relocation Expenses Scheme.

Given under my hand this..... day of .....201

Signed.....

Signature of Witness.....

Occupation .....