

RELOCATION POLICY

A route to a positive future:

Committed to providing a quality education to pupils with complex needs, including autism and sensory impairment in West Berkshire and Greater Reading



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Purpose

To assist newly appointed employees in meeting the costs of relocation incurred as a result of taking up employment with Brookfields School.

To assist the School in recruitment by providing an additional incentive for candidates for posts which may be harder to fill.

This policy has been adapted from the West Berkshire Council corporate relation policy, version 1.1 (July 2014).

1. Applicability

The terms of the scheme apply to individuals who are newly appointed to employment with the Council:

- 1.1 on a permanent contract of employment, or a fixed term contract of at least two years; and
- 1.2 who move from outside a 30 mile radius of the new work location, closer to the new place of work; and
- 1.3 who incur costs as a result of the move.

For an employee to be eligible for payment under the scheme, the job advertisement must state that relocation expenses apply to the appointment.

2. Responsibilities

The Chair of Governors is responsible for:

- 2.1 determining whether the relocation scheme will apply to a post being advertised for appointment;
- 2.2 including a reference to the relocation scheme in the text of the advertisement submitted to HR;
- 2.3 determining the maximum amount that will be paid and what expenses or payments will be covered;
- 2.4 agreeing payment of relocation expenses, where applicable, with the new employee;
- 2.5 informing HR of the content of the agreement to pay relocation expenses (cost limit and items payable).

Human Resources is responsible for:

- 2.6 advising managers and employees on the application of the scheme;
- 2.7 keeping a copy of the agreement on the personal file.

Payroll is responsible for:

- 2.8 processing claims for payment;
- 2.9 keeping a record of all claims paid with receipts.

The employee is responsible for submitting claims promptly and in the agreed format, with supporting receipts or other documentation as required.

3. Text for advertisement

Where the Chair of Governors has determined that the relocation scheme will apply, the advertisement text should include the following; *“The School’s relocation expenses scheme will apply to this post.”*

4. The scheme

The scheme only applies to the recruitment of Headteacher and Deputy Headteacher posts.

All costs arising from the relocation scheme will be met from the service budget.

The absolute upper limit on payments is £8,000 for a Headteacher and £4,000 for a Deputy Headteacher post.

The Chair of Governors has discretion to set a lower limit and should therefore determine, before the post is advertised, what the overall financial limit will be for expenses under this scheme for a particular post.

The Chair of Governors has discretion to determine which expenses an employee may claim, and whether to make a payment for ‘setting up expenses’. Therefore, on appointment, the Chair of Governors should agree with the employee what expenses will be paid (see sections 6 and 7 below) subject to the overall financial limit.

Employees will only be reimbursed for actual costs incurred, supported by receipts or other documentation as appropriate, which must be solely due to relocation for the purpose for taking up employment with the Council.

In order to obtain tax relief on up to £8,000 of approved expenditure, payment must be made in the tax year the employee relocated, or by the end of the following tax year.

If an upfront payment is made for setting up expenses (see section 6 below) this will be taxable.

Subject to the maximum limit determined by the Chair of Governors;

- 4.1 The total cost of relocation assistance should not exceed the lower of 40% of the new employee’s starting salary or £8,000; and
- 4.2 Employees on fixed term contracts of less than four years will be limited to a maximum of £2,000 for each year of the contract.

5. Setting up expenses

A lump sum advance payment of up to a maximum of £3,000 may be made to new employees who are relocating and setting up a new home.

This payment is intended to assist employees with:

- 5.1 securing temporary accommodation; and/or
- 5.2 the purchase of furnishings, transfer and connection of appliances; and/or
- 5.3 any other essential costs associated with relocation.

If this setting up payment is made the Chair of Governors may restrict the employee from submitting claims for some or all of the expenses in section 7. Such restrictions will be made clear at the time of agreeing a setting up sum.

This advance payment will be taxed in accordance with HMRC rules.

6. Expenses which may be claimed

Travelling expenses when relocating from outside UK in respect of;

- 6.1 Cost of air travel fares when relocating from another country; and
- 6.2 Cost of a taxi or second class rail fare from the airport to the employee's initial destination.
- 6.3 Deposit for rented accommodation.

Travel and overnight accommodation costs associated with house-hunting:

- 6.4 50% of actual costs incurred or a payment of up to £500 (whichever is lower) for one house-hunting trip for the employee and his/her family.

Costs of buying and selling property including;

- 6.5 solicitors' fees;
- 6.6 estate agent's fees;
- 6.7 valuation costs;
- 6.8 fees for land registry and local searches;
- 6.9 basic property survey fees; and
- 6.10 stamp duty.

Costs of removal, including insurance, from the old home to his/her new home, based on the lower of two quotations for;

- 6.11 one set of removal costs; and (if necessary)
- 6.12 temporary storage of furniture for a period not exceeding six months.

Evidence of the two quotations and the actual costs incurred must be provided. If the employee wishes to use a more expensive company he/she must meet the difference in cost him/herself.

Temporary subsistence expenses, for or a period of up to six months. The employee may claim either;

- 6.13 Whilst two homes have to be maintained, up to £60 per week subsistence expenses plus a sum equivalent of a second class return rail fare home per 4-week period; or
- 6.14 Home to work mileage expenses of up to £60 per week where an employee commutes a distance exceeding 30 miles, and where the Chair of Governors considers the distance to be reasonable. This allowance is taxable.

Evidence of circumstances may be requested.

7. Claims and payment

No payments can be made until the employee starts work for the School.

Where possible, invoices should be made out to Brookfields School in order that the School may pay the invoice directly. The employee will be recharged in event of any excess.

If direct invoicing is not possible, the employee should submit a claim for reimbursement of expenses incurred, supported by the appropriate receipts and any other documentation required (e.g. quotations).

All claims must be:

- 7.1 submitted to payroll on the School's [travel claim form](#); and
- 7.2 supported by appropriate invoices, receipts or other documents; and
- 7.3 authorised by the Chair of Governors.

Where options 8.2 or 8.3 are not available or viable, the School may raise a payment, subject to the approval of the Chair of Governors.

When the total payments made reach the sum that has been agreed between the Chair of Governors and the employee no further payment will be made under the scheme.

8. Undertaking to repay in the event of leaving the School's employment

Permanent employees who resign and leave the School within three years of appointment must repay the costs of expenses received under the scheme as follows;

- 8.1 if leaving within 1 year of taking up appointment with the School, all expenses paid must be repaid.
- 8.2 if leaving after one year of employment, the total sum of expenses to be repaid will be reduced by $1/24^{\text{th}}$ for each month's service after the end of the first year.

The repayment clause is applicable if an employee leaves to take another job within the same local authority.

Employees on fixed term contracts must repay any relocation expenses that have been paid if they leave the School before their contract is due to expire.

All employees intending to claim under the scheme must sign a repayment agreement. This will be issued by Human Resources. No payment will be made prior to receiving a completed and signed agreement from the employee.

Employees who are made redundant, or retire early on the grounds of permanent ill health or efficiency will not have to repay expenses under the scheme.

9. Record keeping

A copy of the repayment agreement will be kept on the personal file within Human Resources.

Payroll will keep a record of everything paid and will hold copies of receipts on file

Copies of claims authorised should be kept within the authorising service for future reference.

Appendix 1 – Brookfields School Relocation Scheme Repayment Agreement

Before any payment can be made under the terms of this scheme, the employee must complete and sign the undertaking below.

Name	
Date of appointment	
Post title	
Service	
Maximum expenditure agreed under the relocation scheme	
Specific items agreed or excluded	

I confirm my appointment to Brookfields School and that I have accepted the offer of financial support in accordance with the relocation scheme, as set out in the table above. I undertake to repay any sums paid under the relocation scheme as follows:

- In the event of my leaving the School's employment within 1 year of taking up the post, I will repay in full the expenses paid.
- If I leave within the second or third year of employment I will repay the total sum of expenses paid but reduced by 1/24th for each month's service.

The repayment clause is applicable if an employee leaves to take another job within the same local authority.

I authorise any such amounts owing by me to the School to be deducted from the final salary and/or other allowances payable to me by the School on termination of my employment, should I leave my post within the timescales specified.

I confirm that I have a copy of the relocation scheme and that I have read and understood it.

Signed	
Date	

Signature of Chair of Governors	
Date	

Please send a copy of this completed and signed agreement to Human Resources

Signed: Date:
Policy Holder

Signed: Date:
Headteacher/Governor