



school logo

Ref: 029/16/1

RELOCATION POLICY

[insert school name and logo] part of the Unity Schools Partnership]

School staff and recognised unions were consulted by Suffolk County Council on this document and it was accepted by the Unity Schools Partnership Board when [insert name] school joined the Trust on:	Dec 2016
It was ratified by the [Academy name] Local Governing Body on:	[date]

RELOCATION POLICY

Unity Schools Partnership aims to recruit the most talented individuals. This policy is intended to support this aim by providing assistance to new employees who have to relocate to take up a post within the Trust.

SCOPE

This policy applies to:

Teaching Staff appointed on Main / Upper / Leadership pay scales;
Support Staff appointed on the Trust's Support Staff pay scale at grade 7 or above.

Support Staff employed on grades 1-7 (up to and including salary point 42) are not eligible as the Trust and its schools would normally expect to recruit from within the immediate and surrounding area. Posts which are externally funded fall outside of this policy. Individuals may be eligible to claim costs in line with the relevant funding arrangements.

This policy covers the removal of domestic items only.

ELIGIBILITY

- a) To qualify the individual must fulfill all of the following criteria:
- b) The expected duration of their employment with the Trust should be at least two years.
- c) Their existing home is not within reasonable daily travelling distance i.e. more than 45 miles or more than one hour travelling time from the main base for working within the Trust.
- d) Their new home is within a reasonable distance from their main base for working within the Trust (usually 45 miles).
- e) Neither they nor their partner is in receipt of a relocation package from another organisation.
- f) Any claim must be made within two years of joining the Trust and while still in its employment.

Relocation allowance

Relocation expenses (supported by receipts) will be reimbursed up to ten per cent of the individual's gross starting salary to a maximum of £8,000.

Reasonable expenses incurred may include the following:

- Removal of furniture and personal effects, including packing and insurance.
- Temporary storage of personal effects if a direct move to the new residence is not possible.
- Professional fees incurred in connection with the selling of the old residence and the purchase of a new residence e.g. Estate agent's, surveyor's or legal fees, stamp duty, mortgage arrangement fees.

- Travel and accommodation expenses incurred during preliminary visits to the area to view prospective properties (meals are excluded). All fares will be reimbursed at standard class only.
- The cost of a one-way economy class airfare or standard class rail ticket or mileage claim for appointee and family to relocate.
- Costs towards temporary accommodation whilst searching for a permanent residence for a reasonable time period (up to a maximum of one calendar month).
- Disturbance allowance, to replace domestic goods which are not suitable for the new home. (Up to a maximum of £2,000 of the total relocation allowance).
- Deposit for rented accommodation

All expenses will be reasonable and discussed with the individual's line manager, agreed and authorised in advance by either the Headteacher of the receiving school, or a designated member of the Trust's Executive Leadership group.

Payments for relocation expenses are treated as part of an individual's earnings for Income Tax and National Insurance Contribution purposes. The first £8,000 (of eligible expenses) is, however, exempt from Income tax and NICs. Further guidance can be found at: <http://www.hmrc.gov.uk/guidance/relocation.htm>

For expenditure in currencies other than sterling the exchange rate will be that used by the Trust's finance department at the time of processing.

If more than one individual relocates to the same address a claim should be made by one employee.

The relocation allowance will be pro-rated for part time staff.

Eligibility and level of payment may be varied in exceptional circumstances. This will be discussed with the recruiting manager and approved by either the Headteacher of the receiving school or a designated member of the Trust's Executive Leadership group.

Repayment of allowance

Should the individual voluntarily leave or be dismissed (with the exception of redundancy) from the Trust within three years of commencing employment with the Trust, they will be required to repay a proportion of the reimbursed expenses. This amount will decrease by 1/36 for every month of service completed.

Administrative process

Requests for payment must be submitted to the Trust's Director of Operations. All claims must be supported by original receipts and evidence that the appointee has moved to take up their appointment.