



Relocation Assistance Policy and Procedure

Version 4.0

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Name and Title of Author:	Lisa Pipes, Director of Human Resources
Name of Responsible Committee/Individual:	Trust Board
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POLICY STATEMENT

The Education Alliance (the Trust) has a vision based on seeking excellence through inspirational leadership, teamwork, innovation and challenge we work to ensure that all of us achieve our best. Our values are:

- Working together for students
- Generating ideas and sharing outstanding practice
- Promoting independence and interdependence
- Encouraging questioning, feedback and challenge

The Trust has four guiding principles:

- Focus on learners to drive decisions
- Believe in the team
- Keep it simple, do it right
- See it, own it, make it happen

The success of the Trust relies on recruiting and selecting the right people with appropriate skills, knowledge, qualifications, experience, abilities and competencies to meet current and future requirements. The Trust endeavours to recruit and select the right people in a fair, consistent, timely and cost effective manner in line with current legislation and statutory requirements and safeguarding sits at the heart of everything we do. This policy sits alongside the Trust's Recruitment and Selection Policy and Procedure, recognising that relocation assistance may sometimes be required to encourage and enable candidates from outside the local geographical area to apply for positions within the Trust. This is critical at a time where locally and nationally, the recruitment and retention of teachers is becoming increasingly challenging.

Relocation assistance may be offered at the CEO's discretion and it should be included in the advert for difficult to recruit to positions as a potentially accessible benefit.

1. PURPOSE

Relocation assistance should only be considered for difficult to recruit to posts and a decision to offer relocation assistance should be made prior to the advertisement of a vacancy. If approved by the CEO, the advertisement should clearly state that the successful applicant would be eligible to claim for relocation assistance should they meet the criteria, to ensure this policy is used fully as an aid to attracting and recruiting staff.

2. SCOPE

This policy applies to candidates where relocation assistance is offered and the candidate meets the criteria specified within this policy.

3. ROLES AND RESPONSIBILITIES

The **Trust Board** is responsible for ensuring this policy is applied fairly and consistently across the Trust.

The **CEO** is responsible for approving requests for relocation assistance to be made available to candidates for difficult to recruit to posts.

The **Local Governing Bodies and Heads of School** are responsible for monitoring the application of this policy within their respective schools.

The **HR Department** is responsible for overseeing the introduction, implementation, monitoring and review of this policy and will report to the CEO, the Trust Board and Local Governing Bodies as required. The HR Department will provide advice, guidance and support in the implementation of this policy and procedure, acting as a point of contact for managers. The HR Department will ensure that this policy is implemented fairly and consistently.

Managers must seek approval from the CEO to access relocation assistance for difficult to recruit to vacancies as part of the recruitment authorisation process when they feel it is appropriate to do so.

People who access relocation assistance must adhere to this policy and procedure as failure to do so could result in the non-payment of costs, recovery of payments, delays in payments and potential disciplinary action.

4. EQUALITY AND DIVERSITY

The Trust is committed to:

- Promoting equality and diversity in its policies, procedures and guidelines, adhering to the Equality Act 2010.
- Delivering high quality teaching and services that meet the diverse needs of its student population and its workforce, ensuring that no individual or group is disadvantaged.

5. PRINCIPLES

The CEO will consider all factors affecting the availability of suitable candidates for specific posts. Applicants will not be automatically entitled to relocation assistance if the CEO has not approved this prior to the vacancy being advertised. If relocation assistance is not offered in the vacancy advertisement it will not be offered, unless there are exceptional circumstances and it is agreed by the CEO.

6. ELIGIBILITY CRITERIA

Every employee of the Trust has a main base. To be eligible to access relocation assistance the applicant must move to a property within 35 miles of their Education Alliance main base. There may be exceptional circumstances where applicants do not fulfil the eligibility criteria yet the recruiting manager wishes to offer relocation assistance (e.g. where an advert does not contain reference to a relocation package, but it is viewed to be necessary in recruiting the right candidate for the vacancy). This should be discussed with the Director of HR who will make a recommendation to the CEO.

Applicants are not eligible for relocation assistance if any other member of their household has claimed expenses from another employer for the same property. However, there may be a possibility of sharing the cost with another organisation.

7. LEVELS OF ASSISTANCE

Relocation assistance can be paid to those eligible up to a maximum of £5,000. The level of assistance will depend on:

- Budgetary constraints
- Evidence of market forces that result in a request of a specific amount to be paid

- Invoices/bills should be paid by the applicant and expenses claimed retrospectively
- All expenses reimbursed must be covered by original invoices/receipts

Category	Type of Relocation	Expense Maximum
A	Moves which do not involve the sale or purchase of a permanent property (e.g. rental costs)	£3,000
B	Sale of a property only or purchase of a property within a 35 mile radius of the employee's main base.	£4,000
C	Sale of a permanent property and also purchase of a permanent property within a 35 mile radius of the employee's main base.	£5,000

8. COMPONENTS OF THE RELOCATION ASSISTANCE PACKAGE

The relocation assistance package will consist of payments for reasonable expenses relating to the following components up to the agreed maximum:

- Travel and accommodation expenses during a search for accommodation
- Cost of journey from old to new home (paid at public transport rates)
- Storage of furniture
- Costs relating to temporary accommodation
- Solicitors' fees, disbursements and stamp duty (sale and purchase)
- Survey fee
- Estate agent fees
- Removal of furniture (cheapest of three written quotes)
- Miscellaneous expenses of up to £1,000 arising as a result of the move (e.g. carpets and curtains). Such payments will form part of the maximum sum payable based on the specific category the move aligns with (A, B or C as detailed above).
- Travel expenses
- Continuing commitments payments (e.g. council tax for unsold property)

The relocation assistance claims will be assessed by the HR Department and only paid if deemed necessary and in line with their specified category.

9. TAX LIABILITY

Any payments made will be assessed in line with HMRC guidelines and all payments will be made via Payroll, therefore if any tax deductions or national insurance contributions are required they will be deducted at that point.

10. EMPLOYEES NOT MAKING A PERMANENT PURCHASE

For an agreed fixed period (as authorised by the CEO) an employee may be offered a reimbursement of particular expenses where the new employee proposes to make arrangements which do not involve the purchase of a permanent property within a 35 mile radius of their main base. Such expenses may include reimbursement for temporary accommodation and continuing commitment costs, or travel costs based on public transport rates for a fixed period. Any such expenses will form part of the overall relocation assistance package.

11. CONDITIONS

Employees accessing a relocation assistance package must provide receipts of invoices, otherwise payment by the Trust will not be made. Employees accessing relocation assistance will be required to give a signed undertaking to repay the entire relocation package if they leave the Trust within the first 12 months of appointment. The repayment would reduce in year two to 50% of the costs. In circumstances where repayment is required, a repayment plan will be mutually agreed between the Finance Department and the employee.

12. MONITORING COMPLIANCE WITH AND EFFECTIVENESS OF THE POLICY

Effectiveness and compliance of this Policy will be monitored on an annual basis.

13. REVIEW

This Policy and Procedure will be reviewed within two years of the date of implementation with recognised trade unions at local secretary level.

Relocation Assistance Application Form

Details of New Appointment

Name	
Job Title	
Start Date	
Permanent/Temporary	

Tick the relevant box in relation to the reason for the application:

Moves which do not involve the sale or purchase of a permanent property (e.g. rental costs)	
Sale of a property only or purchase of a property within a 35 mile radius of the employee's main base	
Sale of a permanent property and also the purchase of a permanent property within a 35 mile radius of the employee's main base	

Address:

Old Address	New Address

Please list below the amounts you wish to claim and the elements of the criteria you wish to claim for:

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Declaration:

I wish to apply to the Education Alliance for assistance with the relocation expenses actually and necessarily incurred by me in relocating to take up my new appointment with the Education Alliance. In doing so I declare that the information and expense details provided by me are correct and that no other member of my household has received or intends to claim for relocation assistance from this or another employer.

I understand that as a condition for making payment the Education Alliance requires an undertaking that if I leave the Education Alliance within a period of 12 months I will repay the relocation assistance expenses paid by the Education Alliance. If I leave after one year, but less than two years after my start date, I will repay 50% of the relocation expenses the Education Alliance has paid.

Employee’s Signature:

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Date:.....

Director of HR Comments:

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.....

Recommendation:

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.....
.....

Signature:..... **Date:**.....

CEO Comments:

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.....
.....

Approval: Yes/No (delete as appropriate)

Signature:..... **Date:**.....