



RELOCATION ASSISTANCE POLICY

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1. Introduction

- 1.1 Reach South Academy Trust (the Trust) recognises that attracting, recruiting, developing and retaining skilled and experienced employees is central to the achievement of its goals and objectives, and the provision of a high-quality service.
- 1.2 In order to attract and retain top talent, the relocation assistance offered by the Trust will provide financial support to employees who are relocating for job opportunities with our Trust. This is particularly beneficial for filling specialised roles, hard to fill posts or positions in geographically isolated areas. By mitigating the financial burden of relocation, the Trust can widen its talent pool and reduce recruitment costs. Additionally, relocation assistance demonstrates the Trusts commitment to its people, fostering loyalty and reducing employee turnover.
- 1.3 The policy will clearly define eligibility criteria, types of covered expenses (moving services, travel, temporary housing, etc.), and reasonable spending limits. A streamlined claims process with clear documentation requirements will ensure efficient administration.
- 1.4 By investing in relocation assistance, the Trust can build a stronger workforce, improve employee morale, and ultimately achieve greater success.

2. Diversity, inclusion and belonging statement

- 2.1 At Reach South Academy Trust, we are committed to creating a vibrant and inclusive environment that celebrates diversity and fosters a sense of belonging for all. This commitment extends to every aspect of our work, from the education we deliver to the staff we employ. We believe in fairness, equity, and promoting social mobility for all.
- 2.2 We actively promote inclusivity through our People policies and practices. We value and respect every individual, regardless of background, and strive to build a diverse staff and student body that reflects the richness of the communities we serve.
- 2.3 We dismantle barriers to opportunity by ensuring equal access to resources and development opportunities for all staff members. Our People policies are designed to be fair and unbiased, promoting a level playing field for career progression regardless of social or economic background.
- 2.4 Serving Our Local Communities: We actively engage with local communities to understand their needs and perspectives. Our recruitment practices prioritise attracting talent from diverse backgrounds within our local area, further strengthening the connection between the Trust and the communities it serves.
- 2.5 Our People policies are developed and implemented in accordance with the Equality Act 2010. We are committed to eliminating all forms of discrimination on the grounds of age, disability, gender reassignment, marriage/civil partnership, pregnancy/maternity, race, religion or belief, sex, and sexual orientation. This ensures an environment characterised by dignity and respect, free from harassment, bullying, and victimisation.

3. Purpose and scope of policy

- 3.1 This policy applies to Headteachers, School Improvement Leaders and Directors employed by the Trust on a permanent basis.
- 3.2 This purpose of this policy is to help those members of staff who are required to move residence in order to take up an appointment within the Trust.
- 3.3 Other posts may be included at the discretion of the Chief Executive Officer. For these posts, the recruitment position will be assessed at the beginning of the recruitment process by the CEO and Director of People (or nominated deputy), including, where appropriate, the Director of Finance.
- 3.4 At the discretion of the Trust it will determine whether the recruitment market at that time is such that relocation assistance needs to be included in the reward package in order to attract suitable candidates. If it is agreed to offer relocation assistance, this will feature in the advertisement and recruitment information.
- 3.5 This policy does not form part of any employee's contract of employment and maybe amended from time to time.

4. Personnel responsible for implementing the policy

- 4.1 The Board has overall responsibility for the effective operation of this policy. Day-to-day responsibility for its operation is delegated to the Chief Executive Officer (CEO) and the Director of People.
- 4.2 Responsibility for monitoring and reviewing the operation of this policy and making recommendations for change to minimise risks also lies with the CEO and the Director of People.

5. Criteria for relocation assistance

- 5.1 Allowances will be paid to applicable employees and cover the list of expected costs as stated in Appendix 1. If partners are appointed at the same time to work within education community only a maximum of £8,000 (£4,000 each) can be claimed between partners.
- 5.2 Removal Expenses will only be paid from the Port of Entry in the UK.
- 5.3 Allowances will be paid in respect of the new home, provided that:
 - It is the place from where the member of staff normally travels to work.
 - It is the member of staff's main residence.
 - The old home is not within 50 miles of their main place of work.
 - Expenses are not directly involved in respect of purchase and sale will only exceptionally be reimbursed beyond 12 months.

- 5.4 No relocation expenses will be payable to an employee taking up a post on a fixed term contract.
- 5.5 If a member of staff has a contract which is classified as a joint appointment (i.e. they are contracted to work some hours in another Trust) their relocation expenses will be reimbursed in proportion to the contracted time they spend with this Trust. They will be subject to the conditions detailed in this policy.
- 5.6 In respect of all allowances, staff will be required to produce receipted VAT invoices to cover all the expenditure claimed. This is a legal requirement by HM Customs and Excise for the purpose of recovery of VAT by the Trust.
- 5.7 A VAT invoice must: show the business' VAT registration number; separate the VAT and net amounts; and show the invoice date.

6. Reimbursement and eligibility

- 6.1 Reimbursement will be available in the following situations:
- Buying and selling property
 - Rented accommodation
 - Temporary accommodation arrangements
- 6.2 To be eligible for reimbursement of certain relocation expenses under this policy, employees must be selling their current primary residence and purchasing a new property within the area of their new work location. This ensures support is provided to those making a permanent move as part of their relocation. Employees who are relocating but not purchasing a property in the new area—for example, those choosing to rent—will only be eligible for reimbursement of removal expenses. Similarly, employees who retain their existing primary residence and choose to rent it out after moving will only be entitled to removal expenses. In all cases, appropriate documentation, such as proof of sale, purchase, or a rental agreement for the new property, must be submitted.

7. Buying and selling property

- 7.1 Relocation expenses (Appendix 1) will equate to an upper limit of £8,000.
- 7.2 In all cases, the allowance will only be made when the claims are supported by a solicitors VAT invoice with completion statement and associated VAT receipts obtained by the employee from their solicitor.
- 7.3 Estate agents costs are vatable and, therefore, a copy of the estate agents' VAT invoice will be required.
- 7.4 In addition, a copy of the removal firm's receipted VAT invoice will be required. Three quotes should be obtained (Appendix 2). The unsuccessful quotes must also be forwarded in support of the claims.
- 7.5 Any claims based on documentation other than receipted VAT invoices must be agreed in advance by the Director of People in conjunction with the Director of Finance.

- 7.6 All allowances that may be paid will be agreed with and communicated in writing by the Director of People (normally with the job offer), or their authorised representative, prior to the commencement of employment.
- 7.7 A copy of the letter will be sent to the Director of Finance and Executive Business Manager. Managers may not approve or otherwise imply that eligibility to reimbursement of removal expenses will be given, until approved by the Director of People.
- 7.8 Entitlement to removal expenses for house sale and purchase will be dependent upon the move being completed within twelve months of the employee taking up the post. If valid circumstances prevent this, the Trust may use discretion on the time limit.
- 7.9 All staff applying for relocation expenses must complete the Refund Declaration (Appendix 3).

8. Rented accommodation

- 8.1 **Owner occupied (not intending to sell) to rented accommodation** - reimbursement for owner occupied to permanent rented accommodation, will be allowed on the basis of the receipted and miscellaneous expenses necessary (**see Appendix 1**), but this will be regarded as the permanent move and this will be the sole allowance.
- 8.2 **Rented accommodation to rented accommodation** - Reimbursement for rented to permanent rented accommodation, will be allowed on the basis of the receipted and miscellaneous expenses necessary (**see Appendix 1**), but this will be regarded as the permanent move and this will be the sole allowance.
- 8.3 **Rented accommodation to owner occupied** – If the employee is living in rented accommodation but intends to purchase a property within the specified radius criteria, relocation allowance is limited to the costs reasonably incurred in moving from the rented accommodation as set out in **Appendix 1**. No contribution will be made towards the purchase of the new property. This is because employees should not gain financially as a result of the relocation.

9. Temporary accommodation arrangements

- 9.1 At the discretion of the Director of People and only in exceptional circumstances where there is genuine need because a member of staff is unable to dispose of their former home, or set up a new home, the following assistance may also be granted.
- 9.2 The nature of the assistance will be as follows and will last for a maximum of six months, with preference being given to them in the order in which they are listed:
 - a) The payment of a lodging/rent allowance for suitable accommodation. The allowance payable will be determined in accordance with the availability of accommodation in the local market at current rates and will be the lower of the two properties.
- 9.3 This will be determined by the Director of People and the Director of Finance and will be agreed in consultation with the candidate.

- 9.4 Bridging loans or mortgage top-up loans will not be made by the Trust. Individuals requiring these should contact their main mortgage lender.
- 9.5 Reimbursements to cover bridging loan charges or payments to cover negative equity will not be met under any circumstances.

10. Repayment of relocation assistance

- 10.1 A refund declaration (see Appendix 3) will be signed by the employee prior to any payment.
- 10.2 This refund declaration establishes the right of the Trust that in the event of an employee leaving the employment of the Trust within two years (from the initial start date) that expenses previously paid will be reimbursed to the Trust at 1/24th for each whole month outstanding. The 1/24th is applicable to all expenses but in the case of resignation during the first twelve months of employment reimbursement will be 100%. Reimbursement will be expected out of any final salary payments.
- 10.3 Payment will not be required where the reason for leaving is due to redundancy or ill health retirement.
- 10.4 Only in exceptional circumstances will the repayment of relocation assistance be reduced or waived, this will be at the discretion of the CEO.

11. Appeal process

- 11.1 Decisions regarding the application of relocation expenses should be dealt with in a reasonable manner. An employee who believes their request has been unreasonable refused has the opportunity to request a review against the decision using the following procedure.
- 11.2 A written letter of review must be submitted to the Director of People within 14 days of the request relating to relocation being refused. The letter should detail the reasons why the employee believes the original decision was not appropriate.
- 11.3 The Director of People and Director of Finance will review the original decision and assess whether or not the decision reached was appropriate in all the circumstances. The outcome will be communicated in writing and the decision is final. Where the decision relates to a Director or the CEO the Trustees will review the original decision and assess whether or not the decision reached was appropriate in all the circumstances.

12. Review of the policy

- 12.1 This policy is reviewed as required by the Trust in consultation with the recognised trade unions and in accordance with the timeline of any legislative updates.
- 12.2 The Trust will regularly review and monitor the application and outcomes of this policy to ensure it is working effectively.

POLICY HISTORY

Policy Date	Summary of change	Contact	Implementation Date	Review Date
June 2024	New policy	People Team	June 2024	June 2027

Appendix 1 - Expenses Covered (Receipted Only)

1. Buying and Selling

1.1 Sale Expenses

- Legal
- Estate Agents
- Legal costs of one abortive sale due to influences beyond the control of the employee

1.2 Purchase Expenses

- Stamp duty/legal
- Surveys
- Costs of an abortive purchase due to influences beyond the control of the employee
- Removal storage and legal expenses (storage limited to six months and within the guidelines in Appendix 2)

1.3 Miscellaneous Expenses

- Miscellaneous expenses limited to a maximum of 20% of total package.
- All other expenses associated with relocation which may include:
 - Expenses during the search for accommodation
 - Preliminary visits (max of 2 visits)
 - Journey to take up the new post
 - Return visit to supervise removal

2. Rented accommodation (including rented to rented, owner occupied to rented and rented to purchased)

2.1 Receipted Expenses

- Any charges for disconnection of public utilities and white goods serving the existing rented property.
- Any associated administration costs from the letting agent or agents (including check-out fees, penalty clauses and lease arrangement fees).
- Any charges for connection of public utilities and white goods serving the new rented property.
- Any overlap in rental payments.
- Removal Expenses within guidelines specified in Appendix 2

2.2 Miscellaneous Expenses

- Expenses during the search for accommodation
- Preliminary visits (Max of 2 visits)
- Journey to take up the new post
- Return visit to supervise removal

Appendix 2 - Expenses of Actual Removal

1. Removal of furniture and effects

- 1.1 An estimate of the cost of the removal should be approved by the Trust before the removal of the employee's furniture and effects. When furniture is to be removed by contractors, three competitive tenders, in writing should be obtained, wherever possible and submitted to the Trust.
- 1.2 While employees are at liberty to accept a tender other than the lowest, reimbursement should be restricted to the amount of the lowest tender, except for good reasons to the contrary.
- 1.3 The tenders should be subject to the conditions under which removals are ordinarily undertaken by contractors and should not cover special services, e.g. taking down or putting up fixtures, relaying or fitting carpets.

2. Approved Expenditure

- 2.1 The approved expenditure to be paid by the Trust is:-
 - The cost of removal from the old home to the new one of furniture and effects belonging to employees, or to dependent members of their household, at the time of transfer.
 - This may include pedal cycles and heavy but ordinary articles of furniture or garden equipment but, if the removal of some special items (e.g. a concert piano) involves special arrangements, the extra expense of the special arrangements should be met by the employee.
- 2.2 Livestock or animals, other than domestic pets, should be conveyed at the employee's own expense.
- 2.3 The cost of removal from the old home to store locally and then to the new home or, (where housing difficulties necessitate it or where items are wanted for immediate use in furnished temporary accommodation), of piecemeal removal.

Appendix 3 – Refund Declaration

I, _____ (Full Name)

of _____

_____ (Address)

In consideration of receiving relocation expenses from the Trust, hereby agree and declare that:

a) If I leave the employ of Reach South Academy Trust within two years of commencing that employment, I will refund to the Trust the whole or part of the total relocation expenses received by me from the Trust as follows:*

- Within 12 months of commencing employment with the Trust 100% of the total expenses received by me from the Trust.
- After completion of 12 months service, the refund will reduce by 1/24th of the total received for each completed month of service (including the first 12 months).

b) I agree to the recovery being deducted from my final salary payment from the Trust. If the recovery is more than 75% of my net final salary payment, I will refund the Trust the balance above 75% from the salary received from my new post, at a rate of 50% of my new net monthly salary.

*Only in exceptional circumstances will the Trust release me in whole or part from this agreement with the exception that should the reason I leave the Trust be due to redundancy or ill-health retirement I shall not be required to make any such refund.

Signed: _____

Date: _____

I confirm that the above employee is eligible to claim relocation expenses in accordance with the Trust Conditions of Service.

Signature: _____ (Director of People)

Name: _____

Date: _____

