

Relocation Policy – Scarborough PRS

Updated: April 2023

Relocation

The scheme for relocation expenses may be considered by Governors as an option to offer when advertising senior leadership or hard to recruit posts, under consultation with the Governing Body and HR. It may be considered as an offer to employees newly appointed to a teaching or senior leadership post that is a permanent contract and who lives beyond a reasonable daily commuting distance of their new employment, requiring them to move home closer to their new school or workplace. This policy does not apply to posts offered on a 'casual' contract but can be applied to fixed term contracts that are for more than one year.

Eligibility

An employee may receive assistance where:

- a. The new home is within a reasonable radius of the work base and at least 40 travel miles nearer to the work base than the old home;
- b. The move is made within 12 months of taking up the appointment unless approval is given for an extension, and the intent of a claim is lodged within three months of appointment;
- c. Receipts will be produced for all reasonable expenditure incurred, and the original receipted VAT invoices will also be produced (where possible); and
- d. Prior agreement is reached with Governors for included costs / expenses.

Relocation expenses are not payable to a second appointee, i.e. an employee whose spouse or cohabitee has already obtained employment in the area or where financial assistance is receivable from some other source.

Amount that can be claimed

The maximum amount that can be claimed is £2000 This amount is payable without deduction of income tax, however, to qualify for tax relief the relocation must be complete by the end of the tax year following the year in which the new post was taken up.

The allowance is payable for any reasonable costs of a combination of the items listed below:

- Removal expenses - costs of transporting furniture and personal effects (employees must submit three quotes for the removal. The employee is not compelled to accept the lowest quote; however, the allowance payable will be no more than the lowest quote).
- Storage costs - where necessary as an interim arrangement.
- Legal fees, including stamp duty.
- Estate agents fees - for selling your current property.
- Lodging allowances - where necessary as an interim arrangement for a maximum of 12 months
- Housing contents allowance, including carpets, curtains and other necessary additional expenses.

The amounts that can be claimed are dependent on the duration of the employment contract and are set out as follows:

Repayment of relocation expenses claimed

Employees who leave their school role within two years of appointment will be required to repay a proportion of the relocation costs they have claimed. This is based on 1/24th of the total amount claimed for each complete month short of the two years' service. However, in circumstances of failed probation, redundancy or early retirement on grounds of ill health, the recovery of relocation expenses may be waived.