

# St Benedict's Catholic College



# Relocation Allowance Policy

<b>Date reviewed</b>	November 2023
<b>Approved by Governors</b>	November 2023
<b>Date of next review</b>	November 2026

St Benedict's Catholic College  
Relocation Allowance Policy

**1. Introduction**

- 1.1 When a new employee joins the College, we are supportive of their wish to move and become part of the local community. This relocation allowance policy is designed to assist with the costs to new employees of selling their current main residence and purchasing a new property. However, where this isn't possible we may provide support to assist in ending an existing lease and renting a property within the local community
- 1.2 This policy applies to new employees joining St Benedict's who are relocating to take up a teaching post with us that is at least 50 miles, as the crow flies, from their current residence.

**2. General Policy**

- 2.1 The total relocation package available for an eligible employee under this policy shall not exceed:
- £10,000 (incl. VAT) for those buying a new property in order to relocate their primary residence
  - £7,500 (incl. VAT) for those renting a home
- 2.2 Reimbursement for relocation is limited to actual expenses incurred by the new employee, as well as their spouse, co-habitee, partner, family members and dependents living with the employee at the primary residence. All expenses must be accompanied by supporting documentation such as receipts and invoices.
- 2.3 New employees should familiarise themselves with the contents of this policy and should check eligibility with the College Business Manager as well as any entitlement to support before incurring any expenses in reliance on this policy.
- 2.4 Exceptions to this policy may be possible but prior written approval from the College is required before any expense is incurred, either in determining eligibility for relocation support or the extent of any expenses covered. Exceptions will be considered on a case-by-case basis.
- 2.5 If the new employee leaves the college, they will be required to reimburse some or all of the relocation expenses as follows
- within 12 months of commencing employment – 100% of the amount of relocation support paid
  - between 12 and 24 months – 50% of the amount of relocation support paid
  - between 25 and 36 months – 25% of the amount of relocation support paid

### 3. Expenses Covered

#### 3.1 *Movement of household goods.*

- cost of normal household moving and packing services
- normal cost of storage for household goods

No assistance will be provided for the following:

- purchase of fixtures, appliances, equipment or materials for new residence
- tips or gifts to moving company employees
- any services performed by you, your dependents or relatives
- moving or shipment of items such as cars, construction materials, livestock, boats, shrubs, or similar items requiring special handling
- removal or installation of permanently fixed items such as lighting fixtures, fencing, patios, fireplaces, etc
- assembly or disassembly of swing sets, pool tables, waterbeds, outdoor fixtures, appliances, etc

#### 3.2 *Moving to new residence and temporary housing*

- initial travel costs to move to the St Benedict's local area at the most economical price possible
- reasonable and actual expenses incurred for the cost of lodging for up to 6 weeks for those buying a new residence

#### 3.3 *Sale of residence and purchase of new residence*

- if the new employee chooses to sell their primary residence, they can claim for the estate agency fee up to a maximum of 3% of the property sale price
- if the new employee chooses to buy a new primary residence, they can claim for stamp duty at a maximum of 2.5% of the property purchase price
- While the above costs can be claimed, the total relocation package cannot exceed £10,000 (incl. VAT) for those buying a new residence.
- No reimbursement will be given for cleaning, maintenance, installation, or repair costs in either the old or the new residence.
- The above is a non-exhaustive list and we may pay for other items which will be considered on a case-by-case basis. Prior approval will be required from the College.

St Benedict's Catholic College  
Relocation Allowance Policy

### *3.4 Rental assistance*

- the penalty charge for breaking the new employee's rental contract, after they've attempted to have this waived
- estate agency fees in securing a rental property
- While the above costs can be claimed, the total relocation package cannot exceed £7,500 (incl. VAT) for those moving to a rented property.
- The above is a non-exhaustive list and we may pay for other items which will be considered on a case-by-case basis. Prior approval will be required

No reimbursement will be given for the following:

- an end of let cleaning charge
- rent or a deposit

### *3.5 Dependants*

- Support may be given for the relocation of immediate family and dependents – this needs to be incorporated into all of the above expenses.

### *3.6 Trips to find accommodation*

- Support may be given for reasonable expenses incurred while visiting the new location to find accommodation and familiarise themselves with the area.

## **4. HMRC Tax requirements**

- 4.1 As a condition of receiving relocation support from St Benedict's the new employee shall take full responsibility for payment of any and all taxes due in respect of any amounts paid to them. We don't give advice on taxation and will have no responsibility for paying any taxes on the relocation package.
- 4.2 Some relocation costs up to £8,000 are exempt from reporting and paying tax and National Insurance. These are called 'qualifying' costs. For qualifying costs over £8,000, you may have to report and pay tax and National Insurance. For costs over £8,000, there are some qualifying costs and non-qualifying benefits which need to be reported and paid. This is summary information only. For more information see [www.gov.uk/expenses-and-benefits-relocation/overview](http://www.gov.uk/expenses-and-benefits-relocation/overview).

St Benedict's Catholic College  
Relocation Allowance Policy

**Appendix 1 – Claim Form**

**Relocation Allowance Policy – Claim Form**

<b>Name</b>	
<b>Job title</b>	
<b>Salary Scale / Point</b>	
<b>Date Employment commenced</b>	
<b>Previous Address</b>	
<b>New Address</b>	

<b>Item Detail</b>	<b>Cost</b>	<b>Amount Claimed</b>
<b>GRAND TOTAL</b>	<b>£</b>	<b>£</b>

NB: All receipts/invoices must be attached

I acknowledge that should I leave the employment of St Benedict's Catholic College, allowance paid under this claim must be repaid before the final day to my employment

- within 12 months of commencing employment – 100% of the amount of relocation support paid
- between 12 and 24 months – 50% of the amount of relocation support paid
- between 25 and 36 months – 25% of the amount of relocation support paid

Signed: \_\_\_\_\_

Date: \_\_\_\_\_