

<b>Relocation Assistance Policy</b>	
<b>Date approved by Trustees</b>	February 2019
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<b>Compliance lead</b>	Director of People, Employee Engagement and PSTE
<b>Agreed Policy file name</b>	Relocation Policy
<b>Agreed policy location:</b>	RMT Website RMT Information area\Policies and Procedures

## RELOCATION POLICY

### 1. Introduction

- 1.1. Ruskin Mill Trust aims to recruit the highest quality individuals. This policy is intended to support the Trust by providing a financial contribution to the costs new employees incur when they have to relocate either nationally or internationally.
- 1.2 The Company provides discretionary relocation assistance to employees, should business needs arise that cause the Company to require an employee to relocate from their existing property to another.
- 1.3 Relocation assistance may be needed when an employee first starts work with the Company or during the employee's employment, if the Company needs the employee to move to a different site.
- 1.4 This Relocation Assistance Policy may be amended, withdrawn, suspended or departed from at the discretion of the Trust. While it does not form part of any employee's contract of employment and is entirely non-contractual, all employees are required to adhere to the policy and any failure to comply with any aspect of the policy may be treated as a disciplinary matter.

### 2. Scope

- 2.1 This discretionary relocation assistance policy only applies to staff appointed to a position at grade 10 or above on a permanent contract or to a fixed-term position of two-years or more, and who have to relocate their place of residence in order to take up the appointment. We would normally expect staff in grades 1-9 or MS1 - MS4 to be recruited from within the areas local to the Trust.
- 2.2 This policy only applies to the removal of domestic effects from the applicant's current home to their new home and not where the location of work changes but the employee does not intend to move property. Additional travelling costs when an employee stays in their existing property are not covered.

### 3 Qualifying criteria

- 3.1 To qualify the appointee must meet all of the following criteria:

- The Executive Chair of the Trustees in conjunction with the Director of People, Employee Engagement & PSTE must deem that the post warrants the payment of relocation expenses.
- The expected duration of their employment with the Trust should be at least two years.
- They must need to move home to take up an appointment with the Trust.
- Their existing home is not within reasonable daily travelling distance to their new workplace.
- The home that they move to must normally be within approximately one hour's travelling distance of the new workplace.
- Any claim should normally be made within twelve months of taking up the appointment.
- The applicant will not be eligible for relocation assistance if their partner or other member of their household has received similar allowances from any source as a result of their move to the area.
- Payments for relocation expenses are treated as part of an appointee's earnings for Income Tax and National Insurance Contribution purposes. However, the first £8,000 is exempt from Income tax and NICs.

#### **4 Scope of financial assistance**

- 4.1 Actual and reasonable relocation expenses (supported by receipts) will be reimbursed up to twenty five per cent of the appointee's gross starting salary up to a maximum of £8,000.
- 4.2 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.
  - Travel and accommodation expenses incurred during preliminary visits to the area to view prospective property.
- 4.3 The amount reimbursed may be varied in exceptional circumstances with the approval of the Director of People, Employee Engagement & PSTE.
- 4.4 In addition, individuals moving from overseas can claim for a one-way economy class or equivalent airfare for the employee and his/her immediate accompanying family.
- 4.5 Should the appointee voluntarily leave the Trust within 24 months of commencing employment with the Trust, they will be required to repay a proportion of the reimbursed expenses. The repayments are based on a sliding scale dependent on the number of months that have elapsed from the date of the last allowance payment to the date that the employment will terminate.

Time from last payment to date of termination	Amount repayable
0 - 6 months	100 per cent
7 - 12 months	75 per cent
13 - 18 months	50 per cent
19 - 24 months	25 per cent

## 5 Administrative process

- 5.1 Requests for payment must be submitted to the Director of People, Employee Engagement & PSTE. All claims must be supported by original receipts and evidence that the appointee has moved to take up their appointment.