

THE SCHOOL OF ORIENTAL AND AFRICAN STUDIES

RELOCATION EXPENSES POLICY AND PROCEDURE

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1. Introduction

The School of Oriental and African Studies wishes to assist new employees relocating to London or within a commutable distance to London. This policy sets out the School's relocation assistance scheme. It replaces any previous version. The Relocation Expenses Claim Form should be used for claim purposes.

2. Policy

2.1 The School's Relocation Expenses Policy is to compensate, in part, for the financial loss incurred by new employees to the School who are required to relocate their permanent residence (which is not within reasonable daily travelling distance to their new place of work (i.e. the School)) to a new permanent residence within reasonable daily travelling distance of the School as a result of taking up their first UK-based appointment with the School.

2.2 The aim of the relocation policy is to ensure:

- The relocated employee is effective in his or her role as soon as possible.
- The cost incurred to the School is reasonable, agreed and relevant to the relocation.

2.3 The School defines a 'reasonable journey' as being one which from home to your permanent place of work using public transport should not take any longer than 90 minutes using published timetables.

3. Scope

3.1 This policy applies to Academic (Teaching and Research), Teaching & Scholarship, and Research posts at Grade 8 and above newly appointed to a permanent SOAS or SOAS-research related funded post or to fixed-term posts of three years or more, and who have to relocate their place of residence in consequence of taking up employment with the School. Applicants should be aware that if they leave before serving three years' continuous employment from the date of appointment they would be required to refund the entire relocation expenses payment or a portion thereof (see Section 7 below).

3.2 In the event that individuals from the same household both obtain appointments with the School, only one claim for reimbursement of relocation expenses per household will be accepted.

4. Eligibility

Newly appointed employees are eligible for relocation expenses if:

- The employee is a newly appointed member of Academic (Teaching & Research), Teaching & Scholarship, or Research in a post at Grade 8 and above to a permanent or fixed-term post of three or more years duration. The new employee must have to move to within a reasonable travelling distance (defined at section 2.3 above) to SOAS to take up the appointment.
- All relocation expenses claims must be supported by submission of receipts or where the broker is paid directly at least 3 quotations must be submitted to the HR Directorate.
- All claims are inclusive of VAT.
- Under the terms of *The Fixed-term Employees (Prevention of Less Favourable Treatment) Regulations 2002*, the same eligibility rules will apply regardless of whether the appointment is full-or part-time.

5. Relocation Expenses Allowance

5.1 The relocation expenses allowance will only be issued to cover costs in full or part up to the maximum allowance of £8,000. Relocation costs are defined as those necessarily incurred in the relocation of an employee's home and must accord with HM Revenue and Customs' eligibility conditions for tax relief purposes and may include the following:

- Removal of furniture and household effects, including insurance and storage. Three quotations must be submitted to the relevant HR Manager by the recipient in support of a claim for removal costs, the lowest being reimbursed. If the appointee has a strong preference for another relocation company, the School will pay an amount up to the lowest quotation for removal expenses, but up to a maximum allowance limit of £8,000, whatever is the lesser amount. The removal

contract is for the appointee to enter, not the School. Any broker acts for the appointee, even though the School contribution may be paid directly to the broker before delivery if the appointee so requests.

- Where the newly appointed employee is a home owner who sells and purchases a new home as a consequence of appointment to the School: solicitor fees, surveyor's fees, estate agents fee's, stamp duty, and any other appropriate expenditure approved by the relevant HR Manager.
- Travel costs: Car mileage at the School's current approved rate will be made for the most direct one-way route to SOAS on relocating within the relocation expenses allowance limit. The equivalent of a one-way economy rail or airfare by a scheduled airline service by the most direct route for the appointee and dependants will be paid within the maximum £8,000 allowance limit. Any expenses incurred above this level will be the responsibility of the appointee.

5.2 Reimbursement will be made on submission of receipted payments to the HR Directorate. Any expenditure claimed must be essential to the employee's relocation. The HR Payroll & Pensions Team will be responsible for the payment of any relocation expenses.

5.3 Please note employees who have applied for season ticket and computer allowances in addition to the relocation expenses allowance will be liable for any of the extra tax payable on benefits above HMRC limits. Any newly appointed employee in this category should seek advice from the School's HR Payroll and Pensions Manager (John Guyver: jg30@soas.ac.uk).

6. Procedure

6.1 Relocation expenses allowance will only be payable to eligible employees who are required to move to travel to work within reasonable daily travelling distance (defined above) to SOAS. The relocation expenses allowance will only be paid to employees within 12 months of commencing employment with the School and claims must be made on the Relocation Expenses Claim Form to the HR Directorate submitted within this time period.

6.2 Relocation expenses will only be paid on receipt or in the case of removals, after estimates have been approved by the appropriate HR Manager within the HR Directorate direct to the broker.

7. Recovery of relocation expenses on Termination or Resignation of Employment

7.1 In the event of the employee's voluntary termination of their contract of employment by resignation or non-renewal of a fixed-term contract of three years or more and they have received payment of relocation expenses, the employee will be required to repay the relocation expenses they received at the commencement of their employment with the School in accordance with the re-payment scale below:

Up to 18 months service

100% repayment

Over 18 months and up to 3 years

the percentage refund to decrease by one twelfth for each completed calendar months' service in excess of 18 months.

7.2 The departing employee will consent to have any monies due under the scheme deducted from their remaining salary payments payable during their notice period, as set out at section 7.1 above.

7.3 Employees who are dismissed from the service of the School within three years of commencing employment for reasons of redundancy (or non-renewal of a fixed-term contract by reason of redundancy) will not be required to repay any relocation expenses paid to them.

8. Other

Any attempt to defraud the School under this scheme will be treated as gross misconduct, which may lead to dismissal and the automatic withdrawal of the relocation expenses allowance, resulting in the full amount having to be repaid. The full amount of repayment will apply where fraud has been confirmed regardless of the length of continuous service the employee may have had with the School.

9. Approval

The Relocation Expenses Policy and Procedure was approved by Executive Board in February 2009.

The Relocation Expenses Policy and Procedure was given to the School's recognised trade unions, UCU and UNISON, for their information also in February 2009.

10. Effective date of implementation

This policy and procedure supersedes the previous SOAS Relocation Expenses Policy dated September 2002.

The new policy came into effect on 1 April 2009.

**HR Directorate
November 2011**