



STAFF RELOCATION POLICY

Approved By: Trust Board
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1 POLICY STATEMENT

- 1.1 As an employer, the Girls' Learning Trust ('the Trust') is committed to recruiting, developing and retaining exceptional people who support our education mission: to empower girls to thrive through a holistic, rigorous and transformative education that nurtures their intellectual, emotional and personal growth.
- 1.2 The prioritisation of recruitment and retention strategies that attract and retain high performing people who align with our shared ethos and reflect the communities we serve is directly linked to our education mission.
- 1.3 This policy forms part of the Trust's staff recruitment strategy and helps support the recruitment of a diverse and high-performing workforce from across the UK, ensuring that the barriers of geography can be overcome.
- 1.4 This policy also intends to retain existing high performing staff who may seek development opportunities within one of the Trust's other schools, resulting in a relocation.
- 1.5 This policy should be read in conjunction with the following policies, which can be located on the GLT Staff Zone:
 - Safer Recruitment Procedure, which forms part of our Safeguarding and Child Protection Policy
 - The Pay Policies for Teaching and Support Staff
 - Staff Expenses Policy

2 SCOPE

- 2.1 This policy applies to eligible employees as outlined in section 5 who have been identified by the Trust at the time of recruitment.
- 2.2 This policy does not apply to casual staff.
- 2.3 This policy provides for a contribution to the cost of relocation only. It is not intended to meet fully all costs associated with relocation.
- 2.4 This policy does not form part of the contract of employment and may be amended by the Trust at any time.

3 ROLES AND RESPONSIBILITIES

Trust Board

The Trust Board is accountable for the setting of this policy and for the monitoring of its implementation across the Trust.

HR & Remuneration Committee

HR & Remuneration Committee is a subcommittee of the Trust Board, with delegated responsibilities to review and approve policies and to develop and review the Trust's remuneration framework, ensuring it is fair, competitive and aligned with the Trust's objectives, and that it reflects the Trust's commitment to equity and transparency.

Chief Executive Officer

The Chief Executive Officer is responsible for approving all relocation decisions, ensuring due consideration in respect of public value for money and based on the recommendation of the Executive Leadership Team. They are also responsible for monitoring the use of this policy, ensuring transparency and parity across the Trust.

Executive Leadership Team

The Chief People Officer, Chief Financial Officer and Headteachers are responsible for making relocation allowance recommendations to the Chief Executive Officer and for overseeing the implementation of this policy and for monitoring equity across each school and the wider Trust.

4 PRINCIPLES AND ELIGIBILITY

4.1 Decisions regarding which roles may be eligible for a relocation allowance will be guided by the following principles:

- Organisational need: this includes the identification of high-risk or high-impact roles as well as due consideration in respect of public value for money.
- Transparency: eligible roles will be identified prior to advertising and will be included within the job advert.
- Parity: the sum of any allowance will be given due consideration in relation to other allowances issued to other roles across the Trust.

4.2 To be eligible for a relocation allowance the employee must be:

- A newly appointed employee who has accepted an offer of employment with the Trust and who needs to relocate as a result. The home they are leaving must be more than 50 miles away from their work location and they must be moving to a home no greater than 20 miles from their usual place of work.
- An existing employee who has been appointed to a new post which is more than 20 miles away from the school in which they are currently working and more than 20 miles away from their current home. They must be intending to move.
- An existing employee who is moving due to the Trust changing their workplace, for example, an office relocation.

4.3 The travel distance from the new home to the usual place of work must be no greater than 20 miles.

4.4 The employee must be moving to a residence that will be their main residence, which is either purchased or rented.

4.5 Employees are not eligible to claim relocation expenses if:

- The relocation is not due to their job with the Trust.
- Another member of their household receives relocation expenses from the Trust.
- They fail to relocate within 6 months of starting the job and have not received a time extension.

5 AMOUNT AVAILABLE

5.1 This policy provides for a contribution to the cost of relocation only and is not intended to meet fully all costs associated with relocation, although it may do so in some circumstances.

5.2 The maximum level of relocation assistance provided by the Trust will not exceed the relocation exemption qualifying costs, set by the HM Revenue & Customs.

5.3 The total sum of relocation assistance available will be determined on a case-by-case basis, according to the role requirements and the needs of the Trust. The maximum amount of relocation allowance will be made clear on the job advert and will be included in the contract of employment.

5.4 The relocation amount is not a lump sum and will be reimbursed to the employee for eligible expenditure against valid receipts and invoices.

5.5 All expenditure claims must be incurred within 6 months of the employee's start date within the role.

6 TAXATION

6.1 All offers of relocation are subject to HM Revenue & Customs regulations. The employee is responsible for any statutory income tax and national insurance liability incurred as a result of receiving relocation expenses. As the relocation is job related, the element known as the qualifying cost is exempt from tax provided that the following conditions are met:

- A new employee is moving area to start a job with the Trust.
- An existing employee is changing their place of work within the Trust.
- The employee's new home is reasonably close to the workplace and their old home is not.
- The costs are paid before the end of the tax year that is after the one in which the employee started their job.

6.2 Employees do not have to report or deduct anything for HMRC purposes up to the exempt threshold.

7 WHAT CAN BE CLAIMED

7.1 The amount an employee may claim will vary according to their personal circumstances as follows:

Type of Expenditure	Specific Requirements	Amount
Buying and selling a home	The entitlement to claim for reimbursement of actual expenditure for legal fees related to the buying and selling of a home (including surveys).	Up to the full allowance.
Buying only or selling only	The entitlement to claim reimbursement of actual expenditure.	Up to 65% of the allowance.
Rented accommodation	The entitlement to claim the actual expenditure for legal fees related to renting accommodation.	Up to 30% of the allowance.
Investigatory Visits	The employee and their spouse, civil partner and direct dependents may claim	Up to £250 per visit.

	travelling, accommodation and meal allowances for up to four visits to the area to select accommodation and, where necessary, schools.	
Removal Costs	To cover the removal of furniture and personal effects from the old property to the new. This includes moving items into and out of storage.	Up to 20% of the allowance.
Storage Costs	To cover the cost of storage of possessions if completion dates cannot be synchronised.	Up to 20% of the allowance.
Interim Lodging Costs	Entitlement to claim the cost of temporary lodging in the new residential area if the employee has to maintain two homes. This is only permitted if the journey enables the employee to get to work reasonably and to work effectively.	Up to 20% of the allowance.
Interim Travel Costs	Entitlement to claim for interim travel instead of interim lodging. This is permitted if the journey enables the employee to get to work reasonably and to work effectively. The Trust considers a travelling distance over 45 miles from home to the new work base to be unreasonable.	Actual cost for each journey on public transport for a maximum of 12 weeks. If travelling by car, the HMRC Approved Mileage Allowance Payment (AMAP) rate will apply. Mileage is counted as 'private mileage' for the annual charge.

7.2 If the employee decides to buy a property after their appointment commences, they may qualify for reimbursement of the relevant costs. The employee must have made a firm commitment to buy within nine months of their employment commencement date.

7.3 The employee may move into rented accommodation and then claim for later moving into a purchased property. In these circumstances, the full entitlement less any previous claims will apply.

8 AUTHORISATION AND HOW TO CLAIM

8.1 All relocation expenses require prior authorisation. The Chief Financial Officer is the primary authoriser but in their absence the expense may be authorised by the Chief People Officer or CEO.

8.2 Expenses will only be reimbursed if the following conditions are met:

- **Submission Forms:** Claims must be submitted using the forms available from the GLT Staff Zone and must be authorised by the Chief Financial Officer.
- **Timely Submission:** Claims should be submitted as soon as possible, typically within one month of incurring the expense.
- **Supporting Documentation:** all claims must be supported by relevant documents such as VAT receipts, tickets, or credit / debit slips.

8.3 Invoices may be able to be paid directly by the Trust. The employee must discuss this with the Chief Financial Officer before making this arrangement with any relevant supplier.

9 REPAYMENT OF RELOCATION ALLOWANCE

9.1 Employees will be offered a relocation allowance only if they agree to repay some, or all, of the amount given by the Trust in the event that their employment terminates for whatever reason (except by reason of redundancy, ill-health or disability) within two years from the employment contract commencement date.

9.2 In the event that the employee does not relocate, they will be asked to repay all or part of any relocation allowance given.

9.3 Those offered a relocation allowance will be required to sign an employment contract to this effect.

9.4 The amount payable is reduced proportionally and is as follows:

Period of service (from contract commencement)	Amount to be repaid (as % of total expenses)
Leaving 0-6 months from date of expenses paid	100%
7-12 months	75%
13-18 months	50%
19-24 months	25%