

RELOCATION PROCEDURE

Birkbeck recognises that some appointees will need to relocate in order to take up employment with the College; where this is the case, new employees will be provided with appropriate support. Offering relocation assistance is one of the mechanisms that enables Birkbeck to fulfil its mission to attract and recruit staff of the highest calibre.

Relocation support is designed to assist in alleviating some of the financial challenges associated with relocation by assisting new staff who relocate in order to take up an appointment with Birkbeck. The relocation package is intended to be a contribution to the cost incurred in moving and not a commitment to meet the full costs that may be involved.

1.0 PROCEDURE

1.1 Eligibility

Academic staff appointed to posts at Grade 7 and above and senior administrative staff appointed to posts at Grade 8 and above, with an initial contract period of three years or longer are eligible to apply for the relocation allowance. Staff employed in other posts may also be considered in exceptional circumstances, on a case by case basis where there is a clear business justification.

The primary reason for relocating must be to allow the new member of staff to have their only or main residence within a reasonable daily travelling distance of the College i.e. new staff must be moving to within 50 miles of the College or within 90 minutes or less travelling time to the usual workplace. Relocation expenses cannot be claimed if the former residence is within a reasonable daily travelling distance of the College (as defined above). Relocation expenses will be paid once for one household move only.

1.2 Relocation Allowance

The allowance value will be up to 10% of annual salary for eligible staff relocating within the UK and up to 15% for eligible staff relocating from overseas, with a maximum cap of £8,000 in both cases in order for the allowance to be exempt from tax and national insurance deductions.

1.3 Eligible Expenses

Expenditure will be reimbursed within the above limits to cover the following items:

Removal expenses in respect of household, office and personal effects e.g. removal company or van hire charges, packing/unpacking, temporary storage; cost of temporary accommodation i.e. hotel or B&B during search for new home; other expenses necessarily incurred as the result of accepting an appointment with the College e.g. travel expenses and Tier 2 visa (if required).

The above list is not exhaustive and it is advised that reimbursement options are discussed with Human Resources (HR) to ensure that submitted claims meet the HMRC guidance on eligible relocation costs before financial commitments are made.

Expenditure on the following items will not be reimbursed:

Relocation costs of partner/family; legal and estate agent fees associated with selling and/or purchasing main residence; mortgage or housing subsidies; mortgage interest payments on existing home; compensation for any financial loss on the sale of existing home; compensation for other losses such as penalties for early exit from rental agreements or withdrawing a child from school without sufficient notice; home search facilities or financial advice; cost of relocating pet(s); re-direction of mail; council tax bills; indefinite leave to remain; immigration health surcharge. This list is not exhaustive.

1.4 Claim Process

Three quotations for relocation costs must be submitted to HR, the College will reimburse the costs of the lowest estimate. If the staff member wishes to use a removal service other than the one which submitted the lowest estimate the College will reimburse the equivalent value of the lowest estimate and the staff member will be required to make up the difference.

Relocation costs should be claimed within 12 months of commencement of employment by sending a completed staff expenses form to HR. All claims must be supported by receipts.

The College reserves the right to refuse to meet costs which are not covered by the above procedure and have not been agreed in advance by HR. The College also reserves the right to seek evidence of old and new residence e.g. council tax bill in staff member's name.

1.5 Repayment

Any member of staff who claims a relocation allowance and who leaves the College's employment within three years of their start date (except through redundancy or the expiry of a fixed term contract) will be required to repay the relocation allowance by the end of their contract, by deduction from salary unless otherwise agreed, on the following scale:

- During first year of employment: 100%
- During second year of employment: 50%
- During third year of employment: 25%

2.0 RESPONSIBILITIES

The following have direct responsibilities under this policy:

- **Employees**

- Provide quotations and follow process as outlined in the procedure.
- **Recruiting Managers**
 - Refer applicants to this procedure or to HR when requests for information on relocation are received.
- **Human Resources**
 - Provide advice and guidance to eligible staff in a consistent manner and in line with HMRC rules.