



Relocation Policy

Last updated: >> / June / 2012

POLICY RECORD DETAILS		
DATE AGREED:	>> June 2012	
VERSION No.	2	
POLICY OWNER:	FINANCE PAY AND GRADING MANAGER POLICY AND DIVERSITY MANAGER HUMAN RESOURCES	JOB TITLE Dept / Directorate
CONTRIBUTORS: (By Job title, department, directorate)		
Management	As by title above – Finance Manager Strategic HR Manager, Employee Relations Manager	
ER	Employee Relations Advisor	
Trade Union	Trade Union Staff Side Chair and representatives	
DATE/S OF PREVIOUS AGREED VERSIONS AND TITLES		
Policy pre Revision is undated / and dated in content	Previous Policy	
May 2012	The 2012 policy replaced and updated policy (1) in terms of best practice, understanding and ease of use - For clarity and consistency and fairness in application according to organisational needs.	

	Contents	Page
1.	Scope	2
2.	Responsibility for this Policy	3
PART I – RELOCATION POLICY FOR CURRENT EMPLOYEES		
3.	Eligibility, Criteria and Submission	3
4.	Householder status	4
5.	Change in Eligibility on Completion	4
6.	Support Available and Taxable Status	4
7.	Commuting to New Location – Excess fares Allowance	6
8.	Initial Support - Special Leave	7
9.	Initial Support - Travel and Subsistence	7
10.	Initial Support - Temporary Accommodation Allowance	7
11.	Continuing Commitments Home Visits	8
12.	Continuing commitments – Allowance	8
13.	Council Tax	8
14.	Allowances Payable during the Transitional Period	9

15.	Children's Schooling, Board and Lodging Costs	9
16.	Support During Purchase and Sale – Additional Housing Cost Allowance (AHCA)	9
17.	Support for Actual Removal – Expenses	10
18.	Support for Actual Removal – Travel Expenses During the Move	10
19.	Legal Expenses of House or Flat Purchase and Sale of Old Home	10
20.	Abortive Expenses on House Purchase	11
21.	Removal and Storage Expenses	11
22.	Other Expenses – Transfer Grant	11
23.	Enquiries	11
PART 2 RELOCATION POLICY FOR NEWLY RECRUITED STAFF		
24.	Offer	12
25.	Claims	12
26.	Expenses	12

1. INTRODUCTION

1.1 Scope

This policy provides a general guide to help with relocation offered by the British Library for newly appointed staff and staff moving on a permanent basis to take up their post.

Policy Statement

- 1.2** Relocation support can be offered as part of a benefits package to attract new candidates or facilitate the movement of existing staff.

Relocation support is available at the discretion of the British Library and may not be available for all posts. Generally relocation support should be offered to external appointees only when recruiting to posts requiring key skills that are scarce. The costs are borne by the Directorate seeking to recruit or place the employee, therefore approval for relocation support must be given by the Director of the respective Directorate, the Directorate Finance manager, and the Directorate's HR Business Partner. In the case of Executive Directors the approval must be given by the Chief Executive.

These provisions may be varied in exceptional cases where the needs of the organisation require this. Such cases must be supported by a business case and signed off by the Chief Executive, Director of Finance, and Director of HR.

- 1.3** Subject to the caveat in 1.1, the maximum sum that can be awarded to support relocation expenses is £8,000. The person relocating is at liberty to use the allowance to cover any of the allowable expenses from within that fund in whatever proportion she or he finds necessary, subject to any limits set down below. However this figure represents an upper limit rather than a set figure awarded irrespective of whether it is spent.
- 1.4** Expenses must be reasonable, for instance temporary accommodation should be furnished to avoid the need to purchase additional furniture or white goods

when these are also in storage for removal once permanent accommodation is acquired. Goods deemed to be additional rather than replacement will not be allowable.

- 1.5 This policy does not apply to temporary moves from the employee's present location to work either in London or at Boston Spa, which are covered by detached duty terms (details of which can be found on the Intranet under Section B of the Staff Handbook and also the Travel and Expenses Policy).
- 1.6 It is expected that relocation terms will be cost effective in comparison with any alternative provision, and reimbursement will reflect reasonable additional costs necessarily incurred.
- 1.7 Any financial assistance that may be given is for the purpose of enabling staff to purchase or rent a similar type of property to the one enjoyed prior to the move. It is not intended to enable the purchase or rent of a better type of property.
- 1.8 Any employee who has received financial assistance towards moving house may be required to repay the assistance if he or she leaves the Library's employment within 1 year of the relocation.

2 Policy Responsibility

- 2.1 All members of staff referred to within the scope of this Policy are required to adhere to the policy in both letter and principle.
- 2.2 All line managers are responsible for ensuring that this Policy is applied within their own area. Any queries on the application or interpretation of this policy must be discussed with Human Resources prior to any action being taken.
- 2.3 The named Policy Owners are responsible for ensuring the maintenance, regular review and updating of this Policy. Proposed changes to the policy will follow the process as described in [section A: Introduction: paragraph 1.1 of this Staff Handbook](#)

PART I – RELOCATION POLICY FOR CURRENT EMPLOYEES

3. Eligibility

Relocation support is available, at the Library's discretion, to newly appointed and existing staff who have been offered a permanent contract, or a fixed term contract over 3 years in length. To be eligible, you should normally submit your claim for house moving expenses within 12 months of the date on which you take up your new role.

However, in order to qualify for tax relief your relocation expenses must normally be incurred before the end of the year of assessment following the one in which you start your new job.

3.1 Criteria

The purpose of the relocation policy is to assist members of staff in relocating to their new place of work.

The eligibility criteria are:

- You must have been offered a permanent contract of employment with The British Library or a fixed term contract of over 3 years.

- You must be relocating your main residence to within reasonable daily travelling distance (as a guide 1 hour travel time) of your new place of work where it is deemed essential to undertake duties of the post. Assistance will not be given to employees already living within the given distance from their new place of work.
- All expenditure has to be approved by the line management and Responsibility Centre Manager (RCM) where different, and supported by the original receipts, estimates or other appropriate documentation as and when requested. Direct invoicing might get around this need in certain instances.

3.2 Submission of Claims

All costs claimed for relocation should be made as follows:

- Completed claims should be submitted to the line manager or the RCM where different for approval and for arranging payments. The costs are borne by the Directorate to which the individual is transferring.
- Claims should not be made until written authorisation from the manager has been given for Relocation allowance to be paid.
- Claims should demonstrate that one of the three bids giving best value has been chosen, where reasonable.

3.3 Salary on Transfer

- **From Boston Spa to London** - Staff who transfer from Boston Spa to London will be given the same pay lead on salary, as the percentage difference of the Boston Spa and London reference points for the grade.
- **London to Boston Spa** - The salary of staff who transfer from London to Boston Spa should be reduced by the percentage difference of the London and Boston Spa reference points for the grade. Depending upon the circumstances for the move, they may be allowed to keep their London salary on a mark-time basis. (See Section C of the Staff Handbook - Section 8: Mark Time)

4. HOUSEHOLDER STATUS

- 4.1 For the purpose of this policy a householder is an employee with primary responsibility as the owner-occupier (or part owner-occupier) for the home from which the employee is currently travelling to work, or as tenant of a home which is unfurnished accommodation*. If responsibility is jointly held between Library employees then the people who jointly hold this responsibility must designate which of them is to have primary responsibility for the purposes of making a claim under this policy.

A Non-Householder is an employee who does not have householder responsibility.

*Unfurnished accommodation for this purpose normally means accommodation described as unfurnished in the tenancy agreement. It need not be a house

5. CHANGE IN ELIGIBILITY ON COMPLETION

- 5.1 Eligibility for relocation support is on the basis that the employee is relocating into the area and needs to find a permanent new home. If having found permanent accommodation the employee then seeks to move again, payments under the relocation policy cease. Employees must notify their line manager (or Resource Centre Manager if different) immediately if they are arranging to change their accommodation following Relocation.

6. SUPPORT AVAILABLE and TAXABLE STATUS

- 6.1 All payments made by the British Library will be made in line with the HM Customs and Revenue guidelines on relocation expenses. The current guidelines are outlined below, however should the Revenue amend these guidelines employees will be responsible for any changes to tax liabilities.

Removal expenses borne or removal benefits provided by the British Library may be exempt from tax. This exception is only due to employees who change residence as a result of starting a new job or as a result of a transfer within an employer's organisation.

Under the Customs and Revenue's rules there is relief which exempts from tax the first £8,000 of removal expenses and benefits which qualify for exemption. To qualify, removal expenses and benefits must fall into specific categories, and the change of residence must satisfy a number of conditions. The most important condition is that employees must change their sole or main residence as a result of:

- starting a new employment
- a change of duties of the employment
- changing the place where the duties are normally performed

The new residence must be within reasonable daily travelling distance of the employee's new place of work, and the old residence must not be within reasonable daily travelling distance of the employee's new place of work.

In order to qualify for tax relief the removal expenses must normally be incurred or the benefits provided before the end of the financial year of tax assessment following the one in which the employee start the new job. It does not matter when the employee moved to the new home.

Expenses and benefits that qualify for exemption are grouped into six categories:

- disposal or intended disposal of the old residence
- acquisition or intended acquisition of the new residence
- transporting belongings
- travelling and subsistence costs (up to the date of the move) – this is generally for a period of up to six months and must be connected with the purchase of a new residence
- replacement of domestic goods for new residence, and
- bridging loans

However not all relocation expenses are tax free. If the expense does not specifically fall into one of the above categories then any payment will be taxable in full, regardless of the total level of relocation expenses paid. If any round sum allowances are paid where receipts are not required, these payments are taxable in full.

Any payments for items such as curtains, carpets, new white electrical goods, etc, are not treated as qualifying unless there is a good reason why the old items could not be transferred, and so are taxable in full.

Please note: If you are claiming expenses under this policy but you do not change your main place of residence you will remain liable for tax on all payments made. Please note that checks may be made to verify that the claim falls within HMRC's tax free terms.

Tax free expenses and benefits include :-

Cost of disposing of existing home

Legal fees and services
 Advertising, estate agent/auctioneer's fees and services
 Disconnection of services to existing property – electricity, gas, water, telephone
 Costs in redeeming loans secured on the existing home
 Insurance, maintenance, rent and security provision of existing property left empty prior to sale.

Costs in acquiring new home

Legal fees and services
 Loan arrangement costs
 Stamp Duty and Land Registry fees
 Surveys and valuations
 Costs of connecting services

Cost of moving possessions

Packing and unpacking, insurance in transit
 Removal and refitting of domestic appliances, temporary storage.

Travel and Subsistence

Visits to new location and when the actual move takes place
 Travel/accommodation if required to commute until transfer is complete
 Temporary accommodation where old home is left before occupation of new home takes place
 Accommodation and travel for child (under 19) required to stay at the old location or to move to the new in advance, in order to maintain continuity of school education.

Replacement of domestic goods

Carpets, curtains and cookers disposed of, less the value of any sale made, provided they are unsuitable for installation in the new home. It should be noted that this condition requires the disposal of old goods. Relocation expenses are only available for the replacement of items not for the fitting out of a second home.

6.2. EXPENSES AND BENEFITS NOT TAX FREE

- Mortgage or housing subsidies, eg Additional Housing Cost Allowance

- Interest payments on old mortgage
- Mail re-direction
- Council tax bills for old home
- Purchase of children's school uniforms
- Compensation for lost benefit such as unused season tickets

7. COMMUTING TO NEW LOCATION - EXCESS FARES ALLOWANCE

- 7.1** If employees decide not to move house on permanent posting, the Library may within reason, agree to allow an excess fares allowance to be claimed instead. Normally, excess fares allowance is payable for three years but the Library may extend this to five years in exceptional circumstances. It is paid with salary and is taxable and subject to NI.
- 7.2** Calculation of the allowance will be based on the new cost of the daily journey /less the cost at the date of transfer for commuting to work. The allowance will be reassessed only as part of a general revision and not automatically following an increase in fares. The total which can be claimed must not exceed the £8,000 upper limit for relocation expenses.
- 7.3** Employees may, within three months of the date of transfer, change their mind and decide to move house thus claiming the wider relocation allowance. In that case the excess fares will count towards the total allowed for the wider allowance.
- 7.4** The Library will not encourage employees to undertake the strain of daily travel between London and Boston Spa or vice versa and may not even allow it. The Library usually expect any employee who accepts this allowance to use it to pay, in a typical week, for one return journey between London and Boston Spa or vice versa and for accommodation.

INITIAL SUPPORT

8. SPECIAL LEAVE

- 8.1** Householders are eligible for a maximum of seven days' special leave for all transfer purposes, including preliminary visits to look for accommodation and leave to supervise removals.
- 8.2** The equivalent provision for non-householders is three days' special leave which includes the removal process.
- 8.3.** The Library will grant additional leave, with or without pay, if it considers that personal circumstances justify this.

9. TRAVEL AND SUBSISTENCE

- 9.1** During the period covering the special leave provision under section 7, (and subject to requirements and cost limits – see below), employees will be reimbursed for any reasonable and relevant travel and subsistence expenses that they have incurred including travelling expenses necessarily incurred while searching for accommodation during the preliminary visit. This will be payable upon proof of expenditure.

- 9.2 Where car travel has been necessary this will be payable at the basic rate of motor mileage allowance. In case of hire cars, petrol costs only will be reimbursed.
- 9.3 Travelling and subsistence expenses for a dependant relative or child will be payable. Subsistence and travelling expenses will not normally be paid in respect of children under 3 years of age.
- 9.4 Payment will be the actual standard / best value cost by public transport or, if a private motor vehicle is used, at the basic rate of mileage allowance. The maximum payable as a whole in either case is the cost of 1,000 miles at the basic rate of mileage allowance. Use of taxis must have prior approval of the RCM.
- 9.5 Employees who make one or more preliminary visit but in the end decide not to transfer may be reimbursed expenses, provided there are good reasons for formally cancelling or deferring the posting. Such reasons will need to be agreed with the RCM and HR Business Partner.
- 9.6 Employees who have a partner and /or dependants and have not, despite their best effort, found a permanent home in the new location may have a situation where their partner and / or dependants need to make a visit *after* transfer. The Library may consider these costs and the circumstances, and if agreed for payment then the same rates will apply. (The sections which follow explain how to claim expenses for temporary accommodation should it be needed.)

10. TEMPORARY ACCOMMODATION ALLOWANCE

- 10.1 This allowance covers all temporary furnished rented accommodation, including reasonable and best value hotel costs incurred whilst employees familiarise themselves with the area, and focus on finding a more cost effective temporary accommodation while continuing to search for permanent accommodation.
- 10.2 Temporary accommodation allowance is conditional on the Library being satisfied that the employees are genuinely searching. It is conditional also on help being needed to meet additional expense because of continuing commitments in the old location so that where such commitments no longer continue, such additional help is not of itself needed and temporary accommodation allowance will cease.
- 10.3 The allowable period will vary according to whether employees are householders. The line manager in conjunction with the Human Resources Business Partner will review the situation with employees at an agreed time after they have had an opportunity to study the housing possibilities in the new location. Usually the first review will take place 3 months after the employee has moved into temporary accommodation in the new location.
- 10.4 For continued payment of the allowance the Library needs to be satisfied that employees cannot obtain permanent unfurnished accommodation and that their reasons are acceptable for regarding the accommodation they have obtained as temporary.
- 10.5 Employees may receive the allowance on this basis for a maximum of 3 years from the date of transfer if they have dependants and 1 year if they do not. After this the accommodation will be regarded as permanent and the rules regarding continuing commitments payments (see below paragraph 11) will apply.

11. CONTINUING COMMITMENTS - HOME VISITS

- 11.1 Employees claiming a temporary accommodation allowance who have dependants / partners living at the current home, are allowed the cost (based on standard class rail travel) of a return journey at the weekend to their current home or, if the Library agrees, to another place with the same costs. If employees choose to travel by car, basic motor mileage allowance is payable within the limit of the cost of standard class rail fare. Subsistence cannot be claimed on any visits to the old location.
- 11.2 Employees without dependants / partners qualify for one weekend trip while they are in receipt of a temporary accommodation allowance and are allowed the cost of six return journeys home during the first twelve months after transfer. There should be an interval of at least one month between visits.

12. CONTINUING COMMITMENTS - ALLOWANCE

- 12.1 Continuing commitments allowance may be claimed, subject to certain financial limits, if employees have an unavoidable continuing rent or mortgage commitment in their former location.
- 12.2 The calculation of entitlement for owner occupiers follows a formula using financial institutions' mortgage interest rates mentioned below (paragraph 15).
- 12.3 The allowance will normally be paid for up to three months from the date the employee moves into the new permanent accommodation. However, the Library may at its discretion extend this period.
- 12.4 The old property must have been put up for sale, or if rented, notice of termination of lease given.

13. COUNCIL TAX

- 13.1. In some circumstances, it is possible that employees may incur additional Council Tax charges because of a temporary double housing commitment arising from relocation. If neither of the Councils involved will issue an exemption, the Library will reimburse employees additional costs, providing evidence is produced that the additional costs are unavoidable. Please note that reimbursement of Council Tax is not subject to tax relief.

14. ALLOWANCES PAYABLE IN THE TRANSITIONAL PERIOD

- 14.1 This section deals with what happens if employees find that they are unavoidably running two homes for a period of time.

If a new home is found before transfer

- 14.2 Employees cease to be entitled to temporary accommodation or continuing commitments allowances when they dispose of their current home.
- 14.3 If employees have found permanent accommodation in the new location but have to take temporary accommodation in their old location while they are still working there, they will be paid a temporary accommodation allowance for the period up to the date of the permanent transfer to the new location.

- 14.4 If employees have dependants and move with their dependants to the new location between receiving the letter of permanent posting and transferring, they are allowed, for a maximum period of 3 months, the excess cost of daily travel between the new location and the old, within the limit of the temporary accommodation allowance to which they would otherwise be entitled. The Library would have to satisfy itself this arrangement was feasible and compatible with the performance of their duties.

If a new home is not found before transfer

- 14.5 If a new permanent home is not found in the new location, but before transfer employees secure a temporary place to stay in the new location (without their dependants), they may be paid a rent allowance (within limit of temporary accommodation allowance) up to the date of the transfer itself, unless the Library decides that they have taken this step unreasonably soon.

15. CHILDREN'S SCHOOLING: BOARD AND LODGING COSTS

- 15.1 If it is decided that a child should stay behind with relatives or friends in the old location, for study leading to an important examination, e.g. GCSE or A Levels, and the head teacher certifies that certain conditions are met, the Library will reimburse a proportion of the board and lodging costs up to a prescribed amount.

Conditions may include for instance that: there is an important exam, it is due in a proportionate time (e.g. not a year away), the child will be sitting the exam and has applied themselves to study, the move would be a detriment to the study / application / potential results / a place offered for higher education is dependent on the resulting grade.

The reasons for this must be confirmed by the "parent" and the head teacher so that an informed decision can be made as to what is a reasonable, appropriate and proportional approach or arrangement.

- 15.2 Reimbursement may continue for a period which is normally up to five school terms. This arrangement also applies if a child goes to stay in the new location in advance of the family move in order to start the new school year there.
- 15.3 Reasonable travelling expenses for a child between school and home at the beginning and end of term and half term will also be met.
- 15.4 If the family moves during a school term, employees will be reimbursed for day-school fees for the remainder of the term if double payment of fees becomes necessary.
- 15.5 School fees which have to be paid in lieu of notice or fines for not proceeding with the child's education at the old school will be reimbursed.

SUPPORT FOR PURCHASE AND SALE

16. ADDITIONAL HOUSING COST ALLOWANCE (AHCA)

- 16.1 Additional Housing Cost Allowance (AHCA) is a payment aimed at reducing the excess cost of rent or purchase. It can be paid to employees who pay rent as well as to owner-occupiers.
- 16.2 If the additional cost of the new home exceeds that of the former home (based on the valuation given by the HMRC Valuation Office Agency), staff

may be entitled to claim AHCA within an overall limit per year. This overall limit is calculated on the basis of the difference (up to a maximum difference of £30,000) multiplied by the average quoted household interest rates of monetary financial institutions published by the Bank of England for the year up to the date of application. AHCA authorised after 5 April 1998 is reckonable for both tax and National Insurance.

- 16.3 The allowance falls within the overall £8,000 upper limit on relocation costs.
- 16.4 AHCA is payable for up to 5 years. After that, a re-evaluation of AHCA will be carried out, and the allowance will be discontinued or reduced by no less than one fifth each year, depending on the outcome.
- 16.5 Any period beyond the first anniversary of transfer during which employees are paid temporary accommodation allowances, counts towards the total period of their entitlement to AHCA.
- 16.6 Employees who are non-householders may receive the allowance if the cost they have been paying for their accommodation in their old location consists only of rent without an element for meals etc and they continue with a similar arrangement in their new location. Within certain financial limits, the allowance equal to the difference in price or rent will be paid for twelve months and then for a further twelve months at half the original rate.

SUPPORT FOR ACTUAL REMOVAL

17. EXPENSES

- 17.1 All expenses must be found within a limit of no more than £8,000, and where viable be the best value of 3 competitive quotes. Expenses are paid only on production of evidence of payment or invoice.

18. TRAVELLING EXPENSES DURING THE MOVE

- 18.1 Travel costs to the new location will be paid to cover:-
 - a. the person relocating
 - b. the partner/dependants who normally live with the person relocating
 - c. any children under the age of 21 who are not dependants, but who are required to move as a result of the transfer.

19. LEGAL EXPENSES OF HOUSE OR FLAT PURCHASE AND SALE OF OLD HOME

- 19.1 Legal expenses will be reimbursed on house or flat purchase, provided the Library is satisfied that they are reasonable in the light of their circumstances. Employees will also be reimbursed on that basis for expenses connected with obtaining a mortgage or loan, including guarantee and survey fees, the cost of a private survey, and drains test. Invoices must accompany all claims.
- 19.2 Similarly, all the reasonable legal expenses of selling the house will be reimbursed. This provision includes building society mortgage redemption fees, house agents' or auctioneers' fees, advertising costs, stamp duty fees, Land Registry fees and incidental expenses charged by the solicitor. Again, invoices must accompany all claims

- 19.3 Employees should be aware that exceptionally high advertising costs incurred by some agents may not be recoverable in full. In no circumstances should employees incur advertising costs in excess of £250 without prior agreement.

20. ABORTIVE EXPENSES ON HOUSE PURCHASE

- 20.1 The Library has discretion to reimburse abortive legal expenses, survey fees, etc., incurred in connection with a proposed house purchase which does not take place through no fault of the employee. Invoices and case details must accompany all claims.

21. REMOVAL AND STORAGE EXPENSES

- 21.1 The cost will be met of moving furniture and effects to the new home. For furniture removal, employees must obtain three competitive quotes in writing; the cost of the lowest will be reimbursed.
- 21.2 In cases where employees with dependants give up their old home, move their dependants to accommodation that is not the new permanent home and, later, to the new home, refund of the expenses involved will be limited to the estimated cost of direct removal from the old home to the new permanent home.
- 21.3 While looking for suitable accommodation, storage charges will be met for all furniture and effects which are removable at public expense.

22 OTHER EXPENSES

Transfer Grant

- 22.1 The Transfer Grant element that contributes towards the £8,000 limit is normally paid after taking up residence in the new location, and is designed to cover a wide range of expenses incurred when employees are required to move house, including such items as the refitting of soft furnishings (curtains, carpets etc.) or the net cost of buying new ones, taking down and putting up fixtures, installation of appliances, connection of a telephone, cleaning etc.

The Transfer Grant, which is not an entitlement, must be used for the *actual* relocation expenses for which no other provision is made, is up to the following ceilings:

- three or more bedroom property bought or rented unfurnished: £2,655
- one- or two-bedroom property bought or rented unfurnished £1,615
- property rented furnished £625

- 22.2 Regardless of whether the full Transfer Grant is claimed or not receipts must be produced for proof of expenditure. This is to meet Audit and HMRC requirements. However the Library has discretion, in exceptional cases, to make further payments which exceed the above limits for vouched expenditure. If employees think they may be out of pocket and wish to make an additional claim, they will need the agreement of their Responsibility Centre Manager before committing themselves to expenditure over and above the appropriate Transfer Grant. Any such commitment without agreement will not be reimbursed.

The Inland Revenue will tax any part of the Transfer Grant not covered by a receipt, and that receipt must be for an item linked specifically to relocation as set out in [paragraph 21.1](#) above.

23. ENQUIRIES

- 23.1 For clarification on the application of this policy, please contact The Expenses Officer in F&CS, Financial Operations, Boston Spa ext.6209. Please remember that a formal letter of posting must be received before employees become eligible to make any claims or to spend for which employees can be reimbursed by the Library.

PART 2 – RELOCATION POLICY FOR EXTERNALLY RECRUITED STAFF

24. OFFER

- 24.1 The Library has discretion to offer certain relocation expenses to new recruits where there is a need to recruit externally for particular skills and/or experience, and where value for money can be justified. The costs are borne by the Directorate offering the position.
- 24.2 Assistance with relocation expenses may not be given if its availability has not been stated from the outset. This means that the availability of relocation expenses must be stated clearly in the advertisement and indicated as available by management on the Authority to Recruit form under the section “Business Case – provide funding detail”.
- 24.3 The Library must also be satisfied that it is necessary for the recruit to move house to live within reasonable travelling distance of the workplace. The distance should be within 1 hour’s travel time to the place of work.
- 24.4 The assistance provided must not exceed that which would be offered to an existing employee, and should normally contribute to, rather than fully reimburse, the new recruit’s additional housing expenses.

25. CLAIMS

- 25.1. The contract of employment agreeing to the payment of certain relocation expenses must be signed and exchanged before the recruit becomes eligible to spend money which can be reclaimed from the Library.
- 25.2 Expenses are normally paid after taking up residence and employment in the new location. All claims must be accompanied by receipts which vouch for the expenditure.
- 25.3 Completed claims should initially be submitted to the line management who are responsible for checking and approving them and then passed to the Expenses Officer in F&CS, Financial Operations, Boston Spa ext.6209 for checking that they comply with the policy and for payment. Line managers should discuss claims with Accounts Payable if they are unsure about policy.
- 25.4 All bills for payment must be presented for payment within 12 months of taking up appointment, unless there are exceptional circumstances which may prevent this.

26. EXPENSES

- 26.1 The maximum reimbursement must not exceed £8000. A lower amount may be set providing this is stated at the outset.
- 26.2 Vouched expenses may be paid for the following:-

- a. solicitors' fees for house sale and/or purchase
 - b. a structural survey
 - c. estate agents' fees for house sale
 - d. stamp duty on house purchase
 - e. assistance with temporary accommodation costs while seeking permanent accommodation, subject to a maximum of 30 nights. Weekends count towards the 30 nights although no subsistence is payable. It is not payable for a partner. The appropriate night subsistence allowance in payment at the time will be used. See Staff Handbook [Section L](#) Appendix 1 for rates
 - f. removal of household furniture and effects from the old house to the new (including shipping from overseas where appropriate)
 - g. travel costs to take up appointment
 - h. Value Added Tax associated with these items.
- 26.3 New recruits must sign a written undertaking that they will make a pro-rata repayment if they resign after less than 3 years' service.