



Keele University

Relocation/ Removal Expenses Policy and Procedure

Human Resources Department

Lead Director: Director of Human Resources and Student Support
Date ratified by Council: University Executive Committee January 2016
Policy issue date: 1 st August 2016
Policy to be reviewed every 2 years. Date of next review: August 2018
Equality Impact Assessment Date: August 2018

RELOCATION/ REMOVAL EXPENSES POLICY AND PROCEDURE

1 PURPOSE AND SCOPE

- 1.1 Keele University aims to recruit the most talented individuals. This policy is intended to support this aim by providing assistance to new employees who have to relocate to take up a position.
- 1.2 This policy applies to newly recruited University staff with a start date from 1st August 2016 onwards. Staff appointed prior to this date should refer to the previous Relocation/Removal Expenses Policy and Procedure
- 1.3 The relocation package is intended to be a contribution to the cost incurred in relocating, and not a commitment to meet the full costs involved.

2 ELIGIBILITY CRITERIA

- 2.1 To qualify for relocation /removal expenses the individual must fulfil the following criteria:
 - a) The expected duration of their employment with the University should be at least three years. (If a member of staff is appointed for less than three years the maximum reimbursement detailed below will be proportionally reduced to reflect the length of appointment. If appropriate a supplementary claim may be made later if length of contract is extended.)
 - b) The post is funded by the University and not external organisations/ funds.
 - c) Their existing residence is not within reasonable daily travelling distance (more than 45 miles) from their normal place of work as defined in their contract of employment).
 - d) The individual changes their residence to within a reasonable daily travelling distance (within 45 miles) from their normal place of work.
 - e) Any claim must be made within one year following commencement of employment with the University
 - f) Neither they nor their partner is in receipt of a relocation package from another organisation (see section 3.3)
- 2.2 In cases where it is necessary for a newly appointed member of staff to relocate to live within reasonable travelling distance of the University, agreement should be reached with the Human Resource Department as to whether there is entitlement to relocation expenses.

3 ALLOWANCES

- 3.1 The budget for relocation is held locally by recruiting areas.
- 3.2 Eligibility and level of payment may be varied in exceptional circumstances. Changes to this policy may only be exceeded with the approval of the Vice-Chancellor

3.3 The allowance limits and criteria are detailed below:

a) Up to and including Grade 9 posts

Relocation within UK	Up to £4,000	Includes legal expenses
Relocation from outside UK	Up to £6,000	Includes legal expenses

b) Grade 10 professorial and senior management posts

Up to £8,000 in line with tax rules (includes legal expenses)

3.4 The first £8,000 (of eligible expenses) is, however, exempt from Income tax and NICs. Payments for relocation expenses above this threshold are treated as part of an individual's earnings for Income Tax and National Insurance Contribution purposes. A new employee relocating from outside of the UK may claim tax relief for travel expenses in addition to the £8,000 exemption.

3.5 For expenditure in currencies other than sterling the exchange rate will be that used by our finance department at the time of processing.

3.6 Relocation within the United Kingdom

3.6.1. Where approval has been given, the details of expenses eligible for claiming relocation expenses may be found in Annex 1.

3.6.2 The applicant should submit 2 quotations for removal expenses, reimbursement will be made on the lower quotation. Individuals may sometimes wish to use a removal firm other than the one which submitted the lowest estimate. In these circumstances the University will reimburse the cost of the lowest estimate, and the individual must pay the difference.

3.6.3 Expenses will only be reimbursed follow submission of a properly completed Relocation Expenses Claim Form (which may be found on the Keele HR website) along with supporting receipts

3.6.4 The University will not pay suppliers direct or pay any expenses in advance of the employee taking up their appointment or incurring the costs.

3.7 Relocation from outside of the United Kingdom

3.7.1 Where approval has been given, the details of expenses eligible for claiming relocation expenses may be found in Annex 1.

3.7.2 Where a new member of staff is moving from outside of the UK, he/she should write to the HR department with an estimate of costs of relocating family, household and personal effects

3.8 Duplication of Claims

3.8.1 Only one claim for removal expenses may be accepted for each family unit moving to Keele. (A "family unit" is defined as a new employee and spouse/partner and dependants under the age of 19).

3.8.2 Where relocation expenses are claimed from another employer by the spouse/partner of a new Keele employee, this should be declared to the Human Resource Department who may make adjustment in the claim against the University.

3.9 Repayment of Relocation Expenses

3.9.1 Any member of staff leaving the University's employment before the completion of three years' service will be required to repay a proportionate amount of any relocation expenses received.

ANNEX 1- DETAILS OF ITEMS COVERED BY ALLOWANCE

1-The costs of moving residence

Note: the property must be owned by, or a tenancy held by the employee's or one of the employee's family or households for the costs of moving home to be eligible for reimbursement and for tax exemption

The following may be included in a relocation/removal expenses claim:

- a) The legal and other costs of disposing of the old residence (whether owned or rented) e.g. stamp duty, legal fees, estate agent fees, advertising fees, mortgage costs, insurance or security costs as a result of the property being empty whilst awaiting disposal.
- b) If the former residence was rented by the employee, any rent he or she must pay in respect of it while it is unoccupied pending disposal
- c) The equivalent fees for the acquisition of the new property, whether purchase or rental
- d) If the sale/purchase of a property falls through, the above expenses are still able to be claimed
- e) Short term rental expenses, as a prelude to the purchase of permanent accommodation within a maximum of 6 months, may be agreed subject to discussion with Human Resources and at the discretion of the Vice Chancellor

2- Transportation of belongings

The following may be included in a relocation/removal expenses claim:

- a) The physical removal, packing and unpacking/reinstalling of domestic belongings and fittings from the old to the new residence
- b) The cost of storage and insuring belongings during transit
- c) Reimbursement of costs incurred may be made when household and personal effects have been placed in temporary accommodation and later removed to a permanent residence, as long as the second move is within 3 months of taking up appointment.
- d) A member of staff may prefer to remove household and personal effects through the use of self-hire transport. In this case the member of staff should agree the details beforehand with the Human Resource Department

3- Travel and Subsistence

The following may be included in a relocation/removal expenses claim:

- a) A single payment to meet the cost of the employee, their spouse/ partner and any dependants (children under the age of 19) from the old residence to the new residence when the move takes place.
- b) The cost of public transport or air travel will be reimbursed at economy/standard rate only. If a class of travel above economy is preferred, the University will normally reimburse the cost of the economy fare, and the member of staff must pay the difference. Travel for other family members (parents, etc.) will not be reimbursed.

4- Expenses that may not be claimed

Expenses that are explicitly excluded from the University's relocation expenses reimbursement scheme are:

- a) Storage of domestic belongings, other than during transit, will not normally be reimbursed

- b) Removal of office and laboratory equipment from the premises of the employee's previous employer (the employing department may, by prior agreement, be able to fund all or part of these costs)
- c) Costs relating to the relocation and/or quarantine of domestic pets.
- d) Security deposits relating to rented accommodation and other refundable deposits.
- e) Redirection of mail
- f) Council tax bills
- g) Car hire /rental fees
- h) Purchase of new domestic goods.
- i) Payments for services provided by relocation companies (other than household removal fees in line with Annex 1 Section 2).
- j) Assistance with mortgage deposits, loans or bridging loan payments.
- k) Subsidy for moving to an area of higher house prices
- l) Compensation for any loss made on the sale of a home.

Enquiries regarding claims for expenses not referred to in Annex 1 should be directed to the HR Department for consideration.