Relocation Guidance

Project title



1. **Introduction**

This guidance note sets out the University of Stirling’s provisions regarding relocation.

Relocation assistance is discretionary, it is not a contractual entitlement and the University reserves the right to withdraw it at any time. Assistance is judged on a case-by-case basis and each employee's situation and circumstances will be unique. The University therefore retains discretion to tailor the relocation package to suit the particular circumstances and needs of each employee. However, the University will always act fairly and in a non-discriminatory manner.

1. **Purpose**

The purpose of this guidance note is to help with out-of-pocket expenses incurred when an employee relocates as a result of his/her employment with the University.

1. **Eligibility**

To be eligible for relocation assistance:

* The appointment must be for at least 2 years
* The post must be one for which recruitment from within the local area would not normally provide a sufficient applicant pool for consideration
* The employee must be living more than 60 miles away from his/her work location
* The employee must be moving to a new base because of accepting an offer of employment with the University
* The employee must be moving within 60 miles from their base campus location, as detailed within their contract

Claims should normally be made within 12 months of taking up appointment. Relocation assistance will be provided to only one employee at the same residence.

1. **Authorisation**

The offer of relocation assistance is the decision of the Dean of Faculty/Executive Director in discussion with their HR Partner and is conditional upon the eligibility criteria detailed above being met.

Once agreed, the relocation assistance should be notified to HR within the offer of appointment form (normally via Talentlink). Employee’s eligible to claim relocation costs will be notified of this within their letter of appointment including confirmation of the maximum costs.

1. **Amount Available**

The maximum level of relocation assistance provided by the University will not normally exceed 1/12th of gross starting salary, and cannot exceed £8,000 in order to be except from paying tax and national insurance (<https://www.gov.uk/expenses-and-benefits-relocation/whats-exempt>). This amount is not a lump sum but can be reimbursed for eligible expenditure as set out below against valid receipts and invoices.

Employees are required to moderate all expenses involved in their relocation and expenses will be reimbursed only if they are deemed to be reasonable. Assistance is available to provide 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.

1. **Taxation**

All offers of relocation are subject to HM Revenue & Customs regulations; further information is available from <https://www.gov.uk/expenses-and-benefits-a-to-z>

1. **Qualifying Expenses**

The University may reimburse reasonable expenses under the following categories:

* 1. the employee's purchase and sale of property
		1. estate agent fees
		2. legal fees
		3. temporary rental costs to bridge the move (maximum 3 months)
	2. transporting the employee's belongings to the new residence

(3 quotes are required - the University reserves the right to reimburse at the lower estimate)

* + 1. packing & unpacking
		2. storage
		3. removal transport
		4. removals insurance
	1. associated travel and subsistence costs (within pre-agreed limits)
		1. travel to visit new location
		2. travel on the day of the move

**Excluded expenses:**

* transporting office equipment or belongings
* mortgage payments
* household bills

**NB** Please note, any common costs relating to moving to a single property can only be claimed once.

1. **Repayment of relocation assistance**

Employees will be offered relocation assistance only if they agree to repay the amount given by the University in the event that their employment terminates on any basis other than redundancy within two years from the start date of employment. Those offered relocation assistance will be required to sign an agreement to this effect (Appendix 1). The amount repayable is reduced proportionally and is as follows:

|  |  |
| --- | --- |
| Period of service(from date of employment) | Amount to be repaid (as % of total expenses) |
| 0-12 months | 100% |
| 13-24 months | 50% |

Repayment will not be required if the reason for termination of the employee's employment is redundancy. In the event that the employee does not relocate, he/she will be asked to repay all or part of any relocation assistance given.

1. **Making a claim**

Employees must obtain written agreement from HR prior to committing to any spend; requests should be emailed to HROperations@stir.ac.uk. Relocation expenses must be claimed on the University relocation claim form (Appendix 2) which should be countersigned by the employee's Dean of Faculty or Executive Director and supported by valid receipts.

All relocation expenses must be claimed within 12 months of taking up the appointment with the University unless otherwise agreed with the University Secretary and Director of HR. It should be noted reimbursement will not occur prior to the start date of employment.

1. **Funding**

Relocation expenses for core funded posts will be reimbursed from the University relocation budget managed by HR & OD. Agreed relocation costs above the standard maximum amount, out with the guidance, or for externally funded posts must be met from Faculty/Service budgets, however this will be processed by HR & OD.

# Appendix 1

**Relocation Assistance – Repayment Agreement**

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name (known as) |  | Employee Number |  |
| Faculty/Service |  | Start date |  |

The University guidance on relocation assistance requires that you confirm your acceptance of the repayment agreement by signing and returning this copy of the agreement.

|  |  |
| --- | --- |
| Period of service(from date of employment) | Amount to be repaid (as % of total expenses) |
| 0-12 months | 100% |
| 13-24 months | 50% |

**Form of Acceptance**

I accept the conditions of the above repayment agreement and agree that any outstanding repayment will be deducted from my final salary payment if necessary.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature |  | Date |  |

*Please return to:-*

*HR & OD Services*

*Cottrell Building (Room 4B1) University of Stirling*

*Stirling FK9 4LA*

*OR*

hroperations@stir.ac.uk

**HR ACTIONS**

* Copy saved to file
* Relocation record updated to allow for payment of expense claims

HR Office Signature: Date:

## Appendix 2

**Relocation Assistance – Claim form**

*Please return to:* hroperations@stir.ac.uk *OR*

*HR & OD Services*

*Cottrell Building (Room 4B1)
University of Stirling*

*FK9 4LA*

|  |  |
| --- | --- |
| Full Name (known as) |  |
| Employee |  |
| Faculty/Service |  |
| Start date |  |
| Address relocated from |  |
| New address |  |
| I confirm this is my main residence  |  |

* Please attach receipts and supporting documents for all expenses claimed.
* For removal claims please provide copies of quotations.

|  |  |  |
| --- | --- | --- |
| Date cost incurred | Details | Amount (£) |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  | Total relocation claim |  |

**Employee declaration**

I declare that expenses claimed are in accordance with the rules and eligibility criteria set out in the University’s relocation guidance and no other claim has or will be made for this expenditure. I agree to and have provided a signed copy of the University’s Relocation Assistance Repayment Agreement.

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Signature |  | Date |  |
| Dean/ Executive Director Signature |  | Date |  |

## HR ACTIONS

* Relocation assistance repayment agreement on file
* Budget sheet updated
* Request submitted to Finance for payment