

## Relocation Policy

### Policy statement

Aston 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.

### Scope

This policy applies to staff appointed to a position from 1 January 2014 at grade 7 (salary point 25) or above on an open-ended contract or to a fixed term position of two years or more, and who have to relocate their place of residence in order to take up the appointment. Staff employed on grades 1-7 (up to and including salary point 24) are not eligible as the University would normally expect to recruit from within the Birmingham and surrounding area. Positions which are externally funded fall outside of this policy. Individuals may be eligible to claim costs in line with the relevant funding arrangements.

This policy covers the removal of domestic items only. The cost of the removal of office and laboratory equipment may be reimbursed at the discretion of the recruiting School/department.

Staff appointed prior to January 2014 will be subject to the previous relocation procedure.

### Eligibility

To qualify the individual must fulfill all of the following criteria:

- The expected duration of their employment with the University should be at least two years.
- Their existing home is not within reasonable daily travelling distance (more than 45 miles from the University).
- Their new home is within a reasonable distance from the University (usually 45 miles).
- Any claim must be made within two years of joining the University.
- Neither they nor their partner is in receipt of a relocation package from another organisation.

### Relocation allowance

Relocation expenses (supported by receipts) will be reimbursed up to ten per cent of the individual's gross starting salary to a maximum of £8,000.

Reasonable expenses incurred may include the following:

- Removal of furniture and personal effects, including packing and insurance.
- Temporary storage of personal effects if a direct move to the new residence is not possible.
- Professional fees incurred in connection with the selling of the old residence and the purchase of a new residence e.g. Estate agent's, surveyor's or legal fees, stamp duty, mortgage arrangement fees.

- Travel and accommodation expenses incurred during preliminary visits to the area to view prospective properties (meals are excluded). All fares will be reimbursed at standard class only.
- The cost of a one way economy class airfare or standard class rail ticket or mileage claim for appointee and family to relocate.
- Costs towards temporary accommodation whilst searching for a permanent residence for a reasonable time period.
- Disturbance allowance, to replace domestic goods which are not suitable for the new home. (Up to a maximum of £2,000 of the total relocation allowance).
- Services offered by our designated relocation service provider.

All expenses will be reasonable and discussed and agreed with an individual's line manager.

Payments for relocation expenses are treated as part of an individual's earnings for Income Tax and National Insurance Contribution purposes. The first £8,000 (of eligible expenses) is, however, exempt from Income tax and NICs. Further guidance can be found at: <http://www.hmrc.gov.uk/guidance/relocation.htm>

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

If more than one individual relocates to the same address a claim should be made by one employee.

The relocation allowance will be pro-rated for part time staff.

Eligibility and level of payment may be varied in exceptional circumstances. This will be discussed with the recruiting manager and approved by either the Vice Chancellor or the Executive Director of HR and OD during the recruitment process.

### **Relocation support**

An individual may decide to use some of the relocation allowance on relocation support services. More information on the services available may be obtained from the relevant HR Business Partner.

### **Repayment of allowance**

Should the individual voluntarily leave or be dismissed (with the exception of redundancy) from the University within three years of commencing employment with the University, they will be required to repay a proportion of the reimbursed expenses. This amount will decrease by 1/36 for every month of service completed.

### **Administrative process**

Requests for payment must be submitted to Human Resources using the Relocation Expense Form. All claims must be supported by original receipts and evidence that the appointee has moved to take up their appointment.