



# Relocation Policy & Procedure

## HR&OD

The purpose of this scheme is to support newly appointed staff with relocation expenses, where they are taking up a post with the University and are required to change their place of residence in order to live within a reasonable travelling distance of the site to which they are assigned.

Relocation assistance is discretionary and is not a contractual entitlement and the University reserves the right to withdraw it at any time. All offers of relocation assistance are subject to the HM Revenue and Customs regulations in force at the time.

### 1. Who is eligible?

You may be eligible for relocation allowance if:

- You are a newly appointed member of staff to a permanent post or to a fixed term of two or more years duration and your existing home is not within reasonable daily travelling distance (45 miles or more\*) from your assigned workplace;

Or

- You have been redeployed to another site which means that your current main residence is at least 45 miles travelling distance\* from the site to which you are assigned;

And

- You are moving from a property which is your main residence to a property which will become your main residence and is within a reasonable distance of the site to which you are assigned (less than 45 miles\*).

\* travelling distance is measured by the shortest practicable route.

Please note if you are appointed to an externally funded post e.g. some research posts, you will *not be* eligible unless provisions have been made within grant applications/research funding to accommodate the additional costs of relocation expenses.

### 2. Criteria

- a) The expenses relating to the move from the old main residence to the new main residence must be incurred by the end of the tax year (5<sup>th</sup> April) following the tax year in which the appointment/redeployment occurs. Otherwise they will be subject to taxation in accordance with the current HM Revenue & Customs regulations.
- b) The acquisition of the new residence must be either in your name or jointly owned by yourself.
- c) You will be expected to move within twelve months of taking up your employment with the University. Please note proof of intention to sell the original property, a new house search, etc., may be required if you have not relocated within 3 months of commencing at Cranfield University and have made claims under this policy. The University reserves the right to reclaim all or some of the monies paid under this policy if there is insufficient or no reasonable evidence that you have made a genuine attempt to relocate.

### 3. Amount payable

If you are eligible, the amount of relocation allowance awarded will either be specified in your offer letter of appointment or where this is not feasible, it will be documented in subsequent correspondence from HR (to include email). All documents will be held on your personnel file. Any amount agreed will be no greater than the maximum allowed under HM Revenue & Customs regulations in force at the time.

### 4. Expenses which can be claimed

All removal expenses must fall within [HM Revenue and Customs regulations](#) for tax free relocation allowances.

Typical expenses include:

- paying the fees connected with house sale and purchase (e.g. stamp duty, legal fees, mortgage penalties for early redemption, survey fees, estate agent's fees);
- interest on bridging loans;
- meeting the cost of travel to the new location for house-hunting trips and temporary living accommodation\* (including some family travel, continuity of children's education, short-term rents whilst new home is being sought);
- paying for the costs of moving household furniture and effects (e.g. physical removal, insurance in transit, temporary storage, the disconnection and reconnection of appliances, including telephone installation/transfer charges, taking down and re-fitting of carpets and curtains and the replacement of certain essential domestic goods because those used in the old home are unsuitable for installation in the new home).

\* Please note the cost of temporary living accommodation can be claimed in accordance with Revenue and Customs Regulations, but only if it is your intention to acquire permanent accommodation to complete the relocation. Temporary accommodation will be paid for up to 3 months, where a permanent move cannot be made immediately. Any request for an extension beyond this time frame must be referred to HR as soon as practicable, for approval.

This is a brief summary of the types of expenses which are covered by HM Revenue & Customs regulations. For further information or clarification before you submit your claim, please refer to the [Relocation Frequently Asked Questions](#) or your local Human Resources Team.

### 5. Process for claiming relocation expenses

In order to claim the above expenses you should:

- a) submit an application form for the relocation allowance, together with a claim memo (these are available on the [Intranet](#) or alternatively can be obtained from your HR department);
- b) submit claims for relocation costs within six months of moving into their new permanent residence, with the exception of temporary accommodation and those expenses marked \* above. These expenses may be claimed before moving into the new permanent residence providing invoices/receipts are submitted;
- c) ensure that all claims have original invoices/receipts attached. Where invoices are submitted in another currency, you will be required to convert to £ sterling for the purposes of your claim. The conversion rate used, should be evidenced and attached;
- d) keep a note of the amount which has been claimed so that the relocation allowance is not exceeded;
- e) declare that you are not eligible for relocation expenses from any other sources.

## 6. What happens if you decide to leave the University?

In view of the significant costs involved in providing relocation assistance any member of staff who resigns from their post within the first two years of commencing their appointment will be required to repay a percentage of the money that they have received according to the following scale:

Resignation within 12 months of the date of appointment during first year	100% of the relocation expenses received.
Resignation within 2 years of the date of appointment during first year	50% of the relocation expenses received.

The sum must be repaid to the University no later than the final day of employment and will be deducted from your final salary payment. (Should this be insufficient to cover the outstanding debt you will be required to reimburse the University immediately by some other means acceptable to the University).

In the event of a member of staff having their employment contract terminated within the first two years of employment for reasons other than redundancy e.g. unsatisfactory probation period, dismissal for misconduct, poor performance, competence and/or capability reasons, they will be required to refund to the University 100% the relocation expenses they have received.

In accordance with the contractual terms of employment, the University has the right to deduct from pay or any other money due, any sums which the member of staff may owe to the University as outlined above.

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