

RELOCATION POLICY

1. INTRODUCTION

This document outlines the financial support the University of Suffolk may make available to help newly appointed staff needing to relocate their home in order to take up their post with us. Prior agreement for this policy to apply, must be sought from People and Organisational Development Team.

2. ELIGIBILITY

These arrangements apply to staff taking up a new appointment if:

- The post is permanent or fixed term of three or more years duration.
- The existing home is more than 50 miles from the new base for employment (UoS)
- The new home is within 25 miles of the new base for employment
 - Existing University of Suffolk staff may be eligible to receive relocation expenses if their role is relocated to a new base.
 - HM Revenue & Customs has set a time limit on relocation. Relocation must be completed before the end of the tax year (5 April) after the one in which the employee takes up their new position.
 - In the event of two members of a single household each taking up appointments with us at or around the same time, the arrangements set out herein will only apply once.

3. APPROVAL

All claims are subject to the approval of the Director of People and Organisational Development, or their delegated authority within their authorised limit. Claims must be submitted via EBIS together with the Staff Expenses claim form and original receipts and, where appropriate, estimates.

Claimants uncertain about the arrangements set out herein, or whose circumstances may necessitate alternative arrangements, should contact a member of the People & Organisational Development team to discuss their needs prior to incurring expenses, in the first instance.

4. ALLOWABLE EXPENSES

HMRC determines the expenses that may be claimed: A full list of claimable expenses can be found on the government website via this link <https://www.gov.uk/guidance/relocation-expenses-480-appendix-7> (See also [Appendix 1 below](#))

As a general rule the claimable expenses are limited to:

- House hunting
- Selling and Buying Property to new location
- Moving from rented-to-rented accommodation
- Rented to purchased accommodation
- Temporary accommodation whilst seeking permanent residence
- Travel expenses

Please note the following requirements under this policy:

- a) The cost of moving furniture and household is claimable based on the lowest of three estimates.
- b) The cost of temporary accommodation normally for up to 3 months while seeking more permanent housing in the area; any cost beyond 3 months is at the discretion of the Director of People & Organisational Development or Head of People.
- c) The cost of storage of furniture and household effects for up to 3 months. Any cost beyond 3 months is at the discretion of the Director of People and OD or Head of People.
- d) The cost of up to four return journeys (and overnight hotel accommodation) from the existing base to the new base, for the purposes of house hunting, house move and/or orientation to the new area. These journeys may be undertaken by the staff member and/or their family. Mileage expenses will be refunded at the current HMRC rate. Where possible the cheapest mode of transport should be selected.

5. MAXIMUM ENTITLEMENT

Payments made to eligible staff will be subject to an overall cash limit of 12.5% of gross salary (as at the time of starting employment) to a maximum limit of £8,000.

6. RECOVERY

Claimants who leave their employment voluntarily within three years of the relevant appointment date shall be required to reimburse monies received through these arrangements as follows:

- During the first year repayment in full
- During the second year repayment at 50%
- During the third year repayment at 25%

7. TAX AND NATIONAL INSURANCE

At time of writing, the benefits set out above are paid free of tax and National Insurance up to the maximum limit of £8000, because they are within the provisions prescribed by the HMRC. Should these exemptions change, recipients will be responsible for any emerging tax and/or NI obligations. Should the University of Suffolk agree to reimburse any expenses outside of the prescribed list, tax and National Insurance will be deducted.

Please also see Appendix 1 for more details of what can be claimed and please also refer to the most up to date rates and advice at <https://www.gov.uk/guidance/relocation-expenses-480-appendix-7>

Appendix 1

House hunting

We will reimburse reasonable travelling expenses and accommodation costs incurred by you to cover visits to the area for house-hunting purposes.

Buying and selling property to relocate

We will contribute towards the following relocation costs reasonably incurred by you in selling one property to purchasing another:

We will not contribute towards the costs of purchasing a new property unless you are selling your existing property to purchase another.

The following may be claimed within the relocation limit:

- Your estate agency, auctioneer and advertising fees associated with selling your existing property.
- The legal and conveyancing fees associated with selling your existing property.
- A contribution towards any mortgage redemption penalty payable as a result of early redemption of the mortgage loan in relation to your existing property.
- Any charges for disconnection of public utilities and white goods (such as washing machines) serving your existing property and connection of public utilities and white goods serving your new property
- The legal and conveyancing fees (including survey, Land Registry, search and mortgage arrangement fees) associated with the purchase of your new property.
- The stamp duty incurred in connection with the purchase of your new property. Please see <https://www.gov.uk/stamp-duty-land-tax/residential-property-rates>
- The costs of moving your furniture, domestic goods and personal possessions from your existing property to your new property, including insurance taken out to cover goods in transit. You should obtain three quotations from different removal companies and use the cheapest unless you have a valid reason not to do so.

Moving from rented to rented accommodation

If you are moving from rented accommodation and intend to rent permanently in the new location, we will contribute towards the following costs reasonably incurred by you:

- Any charges for disconnection and subsequent reconnection of public utilities and white goods serving the existing and the new properties.
- Administration costs of letting agents (including check-out fees, penalty clauses and lease arrangement fees).
- Possible overlap in rental payments.
- The costs of moving furniture, domestic goods and personal possessions, including insurance taken out to cover goods in transit. You should obtain three quotations from different removal companies and use the cheapest unless you have a valid reason not to do so.

Rented to purchased accommodation

If you live in rented accommodation but intend to purchase a property in your new work location, we will contribute towards the costs covered under '*Moving from rented to rented accommodation*' set out above.

Temporary accommodation

If you are renting out your existing property, before or while trying to, sell it any rental income received on the rented out property must be offset against the cost of temporary accommodation. The difference only will be covered by this scheme.

The cost of temporary accommodation is normally for up to 3 months while seeking more permanent housing in the area; any cost beyond 3 months is at the discretion of the Director of People & Organisational Development or Head of People.

Where travel necessitates rail travel or flights, these should be economy class and timed to achieve best value, as far as is reasonably possible.