

Relocation Policy

August 2013

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Relocation Policy August 2013		
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The latest version of this document is always to be found at:

<http://policies.docstore.port.ac.uk/policy-003.pdf>

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1. Scope

The scheme applies to newly appointed academic, research and support staff on grade 7 (spine point 32) or above. It provides for reimbursement of certain expenses incurred directly by an employee concerned in house removals, subject to the conditions as outlined in section two below. The scheme does not apply to part time hourly paid, casual and variable hours contracts.

2. Conditions

All claims under the scheme are subject to the final approval of the Director of Human Resources. With effect from 1 August 2013, the University will reimburse up to a maximum limit of £8,000 (inclusive of VAT) towards expenses necessarily incurred in relocating as a result of obtaining employment with the University. In all cases payment will only be made following submission of a Relocation Expenses Form that is supported by proof of expenditure. Please note that all payments are discretionary and are subject to the following conditions.

1. Relocation expenses are only payable to new employees appointed as a result of an external recruitment advertisement.
2. Although expenses may be incurred prior to the start date, payments for accrued expenses will not be made until after the individuals contractual start date.
3. The relocation takes place within 12 months of taking up the appointment. In exceptional circumstances, consideration by the Director of Human Resources may be given to the extension of this limit.
4. In order to be eligible for financial assistance under this scheme, the appointee must, at the time of appointment, be living more than 30 miles from the University.
5. Financial reimbursement will only be made if the move means the employee will establish a permanent residence within a 30 mile radius of the University premises at University House, Winston Churchill Avenue, Portsmouth PO1 2UP. Where accommodation is purchased outside this radius, the Director of Human Resources has discretion to approve financial assistance only in exceptional circumstances.
6. If an employee is living less than 30 miles away but the move is necessary for operational reasons, any associated payments must have been determined and agreed by the Director of Human Resources in advance.
7. The allowance payable is per household, i.e. not per person. Where two or more employees share accommodation the Director of Human Resources will detail the working of the scheme in the particular circumstances.
8. Fixed term appointments to the University are eligible in accordance with the following scale:

Level of assistance upon initial fixed term engagement	Maximum assistance
Initial appointment for 6 months, but less than 9 months	£500
Initial appointment for 9 months, but less than 12 months	£750
Initial appointment for 12 months or longer	£1,000

Where a fixed term employee is subsequently appointed on an open ended basis they will be eligible for the full scheme benefits. The figure paid will be subject to any amount already received in respect of the fixed term appointment being offset against the maximum sum claimable. The amount paid must also be subject to confirmation that the appointment was the reason for moving to the Portsmouth area. Any payments beyond 12 months of taking up the initial appointment maybe subject to tax and national insurance contributions.¹

9. Part-time pro rata employees who are remunerated on a fractional part-time basis, e.g. 0.5 of full-time or 18.5/37ths, will be eligible for pro rata reimbursement.
10. The expectation is that the employee will reside within a 30 mile radius of the University premises at University House, Winston Churchill Avenue, Portsmouth PO1 2UP. The University will not reimburse expenses incurred through travel to work where the employee does not move house or seek new accommodation but chooses to commute to the University from their existing place of residence.
11. Employees moving from rented property may claim appropriate costs involved in purchasing a property when moving to take up a position at the University and, subject to the limits as defined above, may also claim any additional rent incurred where moving means that two rents must be paid simultaneously for an interim period.

¹ This will be subject to HMRC guidelines in force at the time.

12. Employees who are seeking permanent accommodation but are living in temporary accommodation will be entitled to claim towards the cost of the additional accommodation for a limit of £100 per week for a maximum of 26 weeks. This will be part of the overall maximum limit on the relocation expenses.
 13. All employees intending to claim under the scheme will be required to sign a Personal Declaration (i.e. Form of Undertaking). No payments will be made prior to receipt of a signed Personal Declaration (see Appendix 3).
 14. If an employee leaves their employment at the University of Portsmouth all payments made by the University will be repaid by the employee on the following basis:
 - within one year of appointment: 100% of sums paid;
 - after one year but within 18 months: 50% of sums paid;
 - after 18 months but within two years: 25% of sums paid.
- Wherever practical and in most cases this sum will automatically be deducted from the recipient's salary in stages from date of notice to the date of leaving in equal instalments. If there is an outstanding balance the employee will be required to repay the amount due before they leave the University's employment.
15. The normal time limit for claims for relocation expenses is 12 months. In exceptional circumstances, consideration by the Director of Human Resources may be given to the extension of this limit.

3. What next?

1. The signed and witnessed Personal Declaration Form (i.e. the Form of Undertaking – an example is at Appendix 3) must be submitted to HR Services before any claims can be processed. Details are on the form.
2. Completed Relocation Expenses Form (an example is at Appendix 4) should be submitted with receipts to the Faculty Manager/ Head of Department and the appropriate Faculty Finance Manager or equivalent – for signature. The form should then be sent to the Payments Section, Finance Department, University House.
3. The first Relocation Expenses Form must be accompanied by a Bank Details for Payment of Expenses Form as expenses are paid directly into a bank account.

See the flowchart at Appendix 1 for an overview of the process.

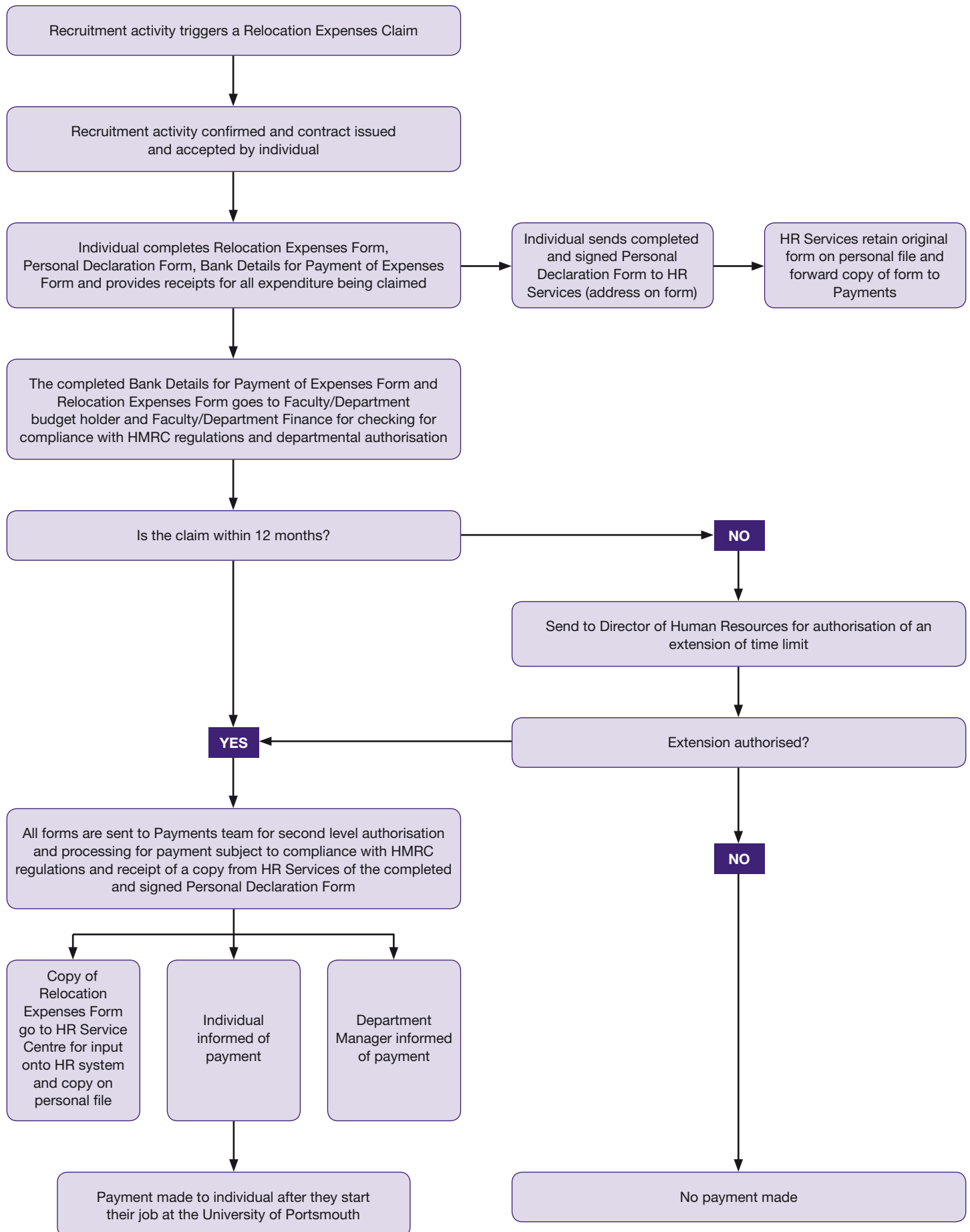
4. Further information

All the required forms are available to download from www.port.ac.uk/departments/services/humanresources/recruitmentandselection/informationforapplicants/removalandseparationguidelines/#d.en.91620.

Any queries about the payment of expenses claims should be referred to the Payments Section, email payments.finance@port.ac.uk.

Appendix 1

Flowchart of procedure



Appendix 2

Examples of relocation expenses

Examples of expenditure that may be reimbursed under this scheme are:

- legal costs
- estate agents' fees
- survey costs
- mortgage redemption fees incurred in the sale of the employee's former home and the purchase of a new property
- additional expenditure incurred through maintaining two homes for an interim period
- additional travelling expenses (at standard fare) for an interim period where two homes are being maintained whilst a family move is completed (for example, to return home to the previous place of residence at the weekends)
- the removal of household effects to the new property
- domestic goods for the new premises

Examples of expenditure that are **not** included in this scheme are:

- food and drink costs incurred
- council tax bills
- redirection of mail
- mortgage or housing subsidies for moving to a higher cost area
- mortgage interest payments for the employee's existing home
- compensation for any financial loss on the sale of the home
- compensation for other losses

It should be noted that the list is not exhaustive and subject to change depending on the current HMRC rules and regulations.

Further information and details can be found at the HMRC website:

Employers' guidance

www.hmrc.gov.uk/manuals/eimanual/EIM03100.htm

FAQs on Income tax and National Insurance contributions on relocation packages

www.hmrc.gov.uk/guidance/relocation.htm

Appendix 3

Personal Declaration Form



Personal Declaration Form

PART 1 Personal Declaration - to be completed by the employee

I, _____ (Name) of _____ (Department) hereby acknowledge receipt of a copy of the University of Portsmouth Relocation Policy and undertake:

1. that any money paid to me by the University of Portsmouth, in accordance with the Relocation Policy, will be repaid by me to the University if I resign or am dismissed within two years of commencing my appointment on the following basis¹:-

- within 1 year of commencing the appointment: 100% of the monies paid;
- after 1 year but within 18 months of commencing the appointment: 50% of the monies paid;
- after 18 months but within 2 years of commencing the appointment: 25% of the monies paid;

2. that I will repay all monies paid to me by the University of Portsmouth under the terms of the Relocation Policy if I do not complete my relocation within 12 months of taking up the appointment;

3. that in such event the University of Portsmouth has the right to recover the whole or part thereof by any legal process or other means, and, that in such event without prejudice to the right of the University of the Portsmouth to recover the whole or part thereof by any legal process or other means, any monies paid to me under the Scheme may be deducted from any salary, wages or other monies due to be paid to me by the University; and

4. that I will notify my Head of Department/ Manager and HR Services (hrenquiries@port.ac.uk) immediately of any change in my circumstances which may make me ineligible to continue to receive assistance for relocation.

Signed:	Date:
Name (in capitals):	
Witness signature:	
Name (in capitals):	
Address:	
Occupation (of witness):	

When completed this form should be returned to the HR Service Centre at:
University House, Winston Churchill Avenue, Portsmouth PO1 2UP

¹ Wherever practical and in most cases this sum will automatically be deducted from the recipient's salary in stages from date of notice to the date of leaving in equal instalments. If there is an outstanding balance the employee will be required to repay the amount due before they leave the University's employment.

completed by the HR Service Centre

- signed	Yes/No
- original on personal file	Yes/No
- copy to payments section	Yes/No

Date _____

Appendix 4

Relocation Expenses Form



Relocation Expenses Form

PART 1 Personal Details - to be completed by the employee

Name:	Title:
Post:	Date appointed:
Department:	
Workplace address:	
Please provide details of your current address, temporary address, previous home address and/or new permanent home (as applicable) indicating which address should be used for correspondence	
If you are claiming for separation¹ expenses please complete the details below:	
Current address	Temporary address
If you are claiming for removal expenses please complete the address details below:	
Previous home address (*Owned/ Rented)	New permanent home address (*Owned/ Rented)
*Date sold Date of moving into new property:	*Date purchased

PART 2 Details of claim - to be completed by the employee

#Receipts must be submitted for all claimed items and each receipt must bear the amount of Value Added Tax (VAT) paid and the VAT registration number

Date	#Details of expenses e.g. removal, legal, separation expenses ¹	Cost £

¹ This includes additional expenditure incurred for travel/ accommodation while seeking permanent accommodation. Where the claim is for excess travelling costs, please give comparative public transport/ second class rail costs of travelling from home to your former work base and the cost of travelling from home to the University.

subject to the overall maximum allowed in Relocation Policy) £ _____

is claimed, and that this claim is made in line with the requirements of the Relocation permanent accommodation in the Portsmouth area and that I am still maintaining my University before completing two years service I will have to repay all or part of my me with the details of repayment terms set out in the Relocation Policy.

Date _____

to be completed by Department

Date _____

(order)

code to be charged in Part 4 below ♦ and send to Payments at:
Churchill Avenue, Portsmouth PO1 2UP

processing of payment - to be completed by the Payments section

		SYSTEM REFERENCE NUMBER	FINANCE CHECK:	
		CREDITOR NUMBER		
REMOVAL		BILL REFERENCE	DATE:	
		OUR REF		
NOMINAL CODE	♦ COST CENTRE CODE	VAT	£	p
		TOTAL CERTIFIED		

Once authorised for payment please send a copy of the form (the original form to be retained in Payments) to HR Services at University House, Winston Churchill Avenue, Portsmouth PO1 2UP

Part 5 Recording details on personal file - to be completed by HR Service Centre

Claim authorised	Yes/ No
Information recorded on HR system	Yes/ No
Copy placed on personal file	Yes/ No

Signed _____ Date _____

Name _____

University of Portsmouth
Department of Human Resources
University House
Winston Churchill Avenue
Portsmouth PO1 2UP
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