



University of  
St Andrews

## Removal and relocation policy

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1.2	Change to Payroll & Pension manager details.	Published	Lisa Stewart	05/12/2019

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## 1. Introduction

- 1.1 Congratulations on your appointment to the University of St Andrews. In order to help you settle into the University as quickly and smoothly as possible, we offer an excellent relocation package, which is described below.
- 1.2 One of the common stresses of relocation can be uncertainty about dealing with expenses. We have attempted to give quite a full description of our procedures in this document, but please feel free to contact [Human Resources](#) with any questions. It is better to clarify any uncertainties in advance, rather than allow misunderstandings to arise. If you have any queries, please contact the [Payroll and Pensions Manager](#) via email or telephone, 01334 462559.

## 2. Do I qualify for relocation expenses?

- 2.1 There are 5 criteria, all of which you must meet to qualify for a relocation package:
  - a. You are a newly appointed member of staff.
  - b. You move from a location of more than 30 miles from the University to a location nearer to the University.
  - c. Your initial contract is for a period of more than 12 months (minimum of 366 days) and the post is funded by the University and not external money. (Staff appointed to posts financed by outside bodies are NOT eligible for grants towards removal expenses unless exceptional circumstances are approved by the Master or the Quaestor and Factor or the grant provides a relocation budget).
  - d. There is only one relocation package per household – e.g. if a husband and wife are both to be employed by the University and are moving from the same address, only one partner can make a claim for reimbursement.
  - e. Your claim is submitted within 12 months of the start of your appointment.
- 2.2 Note: Office removal costs can only be claimed when you change your permanent residence in line with the above criteria.

## 3. Key principles

- a. The type of contract to which you are appointed will determine the relocation package for which you are eligible (See [section 5](#)).
- b. If appointed on a fixed term post which did not meet the original criteria, no further claims may be made if your contract is subsequently extended.
- c. The relocation package is intended to be a contribution to the cost incurred in moving, and not a commitment to meet the full costs involved.
- d. Regardless of the relocation package, which defines the maximum permitted limits of payment, reimbursement is only made in relation to approved expenditure actually incurred.

#### **4. Removal expenditure for which reimbursement is made**

4.1 The University will contribute to the following costs but only if the claim is submitted on a properly completed expenses claim form with supporting receipts or on receipt of an invoice addressed to the University:

- Removal (by sea and/ or land) of furniture, personal and office effects based on the lowest of three estimates from removal companies or services. Members of staff may sometimes wish to use a removal firm other than the one which submitted the lowest estimate. In these circumstances the University will reimburse the cost of the lowest estimate, and the member of staff must pay the difference.
- Costs of storage if there will be a delay between vacating your former residence and entering your new residence.
- Stamp Duty.
- Reasonable property valuation expenses.
- Legal fees /Surveyor/Estate Agent fees connected with the buying of a new residence and/or the selling of your former residence.
- Advertising costs incurred in selling your former residence.
- Short term rental costs in the St Andrews area for periods where you are incurring rental costs in addition to mortgage costs associated with your former residence in advance of sale of the former residence.
- Cost of up to three nights' approved hotel accommodation on arrival or whilst visiting the areas to look for accommodation etc.
- For staff relocating from overseas, the cost of one economy air flight for each of: the member of staff, partner and children. If a class of travel above economy is preferred, the University will normally reimburse the cost of the economy fare, and the member of staff must pay the difference. Travel for other family members (parents, etc.) will not be reimbursed.

4.2 In certain circumstances, it may be more convenient and/or less expensive for an individual to move their belongings themselves, e.g. by hiring a van or making one or more car journeys. Allowable expenses for such arrangements will be clarified by contacting the Payroll & Pensions Manager.

4.3 **Please note that certain costs cannot be claimed against relocation, including the re-direction of mail and council tax bills.**

## 5. Relocation packages

<b>Grade 9 on permanent contract or fixed-term contract of 3 years or more:</b>	Relocation and removal cost up to a maximum of £8,000	
<b>Grades 7 &amp; 8 on permanent contract or fixed-term contract of 3 years or more:</b>	<b>Relocation from within the UK:</b>	Relocation and removal costs of up to £4,000
	<b>Relocation from within the EU:</b>	Relocation and removal costs of up to £5,000
	<b>Relocation from outside the EU:</b>	Relocation and removal costs of up to £6,000
<b>Grades 6 and below on permanent contract or fixed-term contract of 3 years or more:</b>	<b>Relocation from within the UK:</b>	Relocation and removal costs of up to £3,000
	<b>Relocation from within the EU:</b>	Relocation and removal costs of up to £4,000
	<b>Relocation from outside the EU:</b>	Relocation and removal costs of up to £5,000
<b>Temporary or Fixed-Term Contract of more than 1 year and less than 3 years:</b>	<b>Relocation from within the UK:</b>	Relocation and removal costs of up to £1,000
	<b>Relocation from within the EU:</b>	Relocation and removal costs of up to £2,000
	<b>Relocation from outside the EU:</b>	Relocation and removal costs of up to £3,000

5.1 Note: Any payments in excess of £8,000 would have to be declared by the University to HMRC and would be subject to tax.

## 6. Repayment agreement

6.1 If you resign from your post before the normal contract end date, then you may be required to pay back relocation expenses that have been paid to you. Recovery will be at the following rates:

6 months service or less	<b>80%</b>
6 months to 1 year service	<b>60%</b>
1 year to 18 months service	<b>40%</b>
18 months to 2 years' service	<b>20%</b>
More than 2 years' service	<b>Nil</b>

6.2 If you are on a contract of two years or less and serve to the end of the contract, then recovery of payments does not of course apply.

## 7. Getting estimates

7.1 As indicated in [section 4](#) above, members of staff must obtain 3 estimates from removal firms for expenses relating to the removal of personal or office effects. The estimates must be in the name of the employee claiming the expense.

7.2 It should be noted that the University will only reimburse the price of the lowest quote; therefore, any difference must be paid by the employee.

7.3 Please ensure that immediately after obtaining the estimates you contact the [Payroll and Pensions Manager](#), because the entire package of expenses has to be agreed in advance with Human Resources. This package will include not only removal, but also the other relocation expenses. You should not therefore enter into any final commitments before such approval is received.

## 8. Making a claim

8.1 The receipted invoice(s) from the removal company for actual expenses incurred, along with any receipts for travel expenses, should be submitted to the Payroll & Pensions Manager for authorisation and payment. To ease the financial burden of moving, the University can be invoiced directly by the removal company. At the time of making the claim, you must also provide copies of the three estimates that you obtained for the removal. Please note that only original estimates and receipts will be accepted. However, the estimates can be sent to the Payroll & Pensions Manager as electronic copies on the condition that they are on the headed paper of the removal firms.

8.2 Please note that the University reserves the right to refuse to meet costs that are not covered by the regulations and have not been agreed in advance by the Payroll & Pensions Manager.

Version number	Purpose / changes	Document status	Author of changes, role and school / unit	Date
1.0	Migration of the policy to the Governance Zone.	Published	Shona Donohoe Human Resources	02/07/2019
1.1	Change to the classification from internal to public.	Published	Lisa Stewart HR	19/11/2019
1.2	Change to Payroll & Pension manager details.	Published	Lisa Stewart	05/12/2019