



University of
St Andrews

Removal and relocation policy

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1.3	Added in Section 4: Relocating during Covid. Minor tweaks to wording.	Published	Lisa Stewart HR	14/10/2021

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1. Introduction

- 1.1 The University offers an excellent relocation package to support new employees relocating to a location close to the University. The University recognises that one of the common stresses of relocation can be uncertainty about dealing with expenses. This policy attempts to give a thorough description of our procedures however if in any doubt, please contact the [Salaries team](#).

2. Do I qualify for relocation expenses?

- 2.1 There are 5 criteria that must be met to qualify for a relocation package. The person must:

- be a newly appointed employee.
- have moved from a location of more than 30 miles from the University to a location nearer to the University.
- have an employment contract that lasts for a period of more than 12 months (minimum of 366 days), and the post is funded by the University and not external money. (Employees 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).
- not be included in another University relocation package. 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.
- have submitted their claim within 12 months of the start of their appointment.

- 2.2 Office removal costs can only be claimed when the employee changes their permanent residence in line with the above criteria.

3. Key principles

- The type of contract the employee is appointed to will determine the overall relocation package . ([Section 6: Relocation packages](#) provides further details).
- If appointed on a fixed term post which did not meet the original criteria, no claims may be made if the contract is subsequently extended.
- 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.
- 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. Relocating during Covid

- 4.1 Due to the ever changing regulations around international travel, quarantine periods, the need for Covid testing and vaccinations as a result of the COVID-19 pandemic, employees relocating must ensure that they read and comply with the current Scottish Government guidance. The University's [Self-isolation/quarantine FAQs](#) provide links to Scottish Government websites.

5. Removal expenditure for which reimbursement is made

- 5.1 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. Employees 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 employee must pay the difference.
 - Costs of storage if there will be a delay between vacating the former residence and entering the 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 the former residence.
 - Advertising costs incurred in selling the former residence.
 - Short term rental costs in the St Andrews area for periods where the employee is incurring rental costs in addition to mortgage costs associated with the 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 employees relocating from overseas:** the cost of one economy air flight for each of: the employee, 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 employee must pay the difference. Travel for other family members (parents, etc.) will not be reimbursed.
- 5.2 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 [Salaries team](#).
- 5.3 Certain costs cannot be claimed against relocation, including the re-direction of mail and council tax bills.

6. Relocation package

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

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

7. Repayment agreement

7.1 If the employee resigns from their post before the within 2 years of the original start date, then the employee may be required to pay back relocation expenses that have been paid to them. Recovery will be at the following rates:

Length of time since start date	% of fees to be reclaimed
6 months service or less	80%
6 months to 1 year service	60%
1 year to 18 months service	40%
18 months to 2 years' service	20%
More than 2 years' service	Nil

7.2 If the employee is on a contract of two years or less and serves to the end of their contract, then recovery of payments does not apply.

8. Getting estimates

8.1 As indicated in [section 5](#), employees 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.

8.2 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.

8.3 Once the estimates have been obtained, the employee should contact the [Salaries team](#). Please note that the entire package of expenses has to be agreed in advance with HR Salaries. This package will include not only removal, but also the other relocation expenses. Employees should not therefore enter into any final commitments before such approval is received.

9. Making a claim

9.1 The receipted invoice(s) from the removal company for actual expenses incurred, along with any receipts for travel expenses, should be submitted to the [Salaries team](#) 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, the employee must also provide copies of the three estimates that have been obtained for the removal. Please note that only original estimates and receipts will be accepted. However, the estimates can be sent to the [Salaries team](#) as electronic copies on the condition that they are on the headed paper of the removal firms.

9.2 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 HR Salaries.

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
1.3	Added in Section 4: Relocating during Covid. Minor tweaks to wording.	Published	Lisa Stewart HR	14/10/2021