



LEEDS
BECKETT
UNIVERSITY

Relocation Policy and Procedure

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Policy

1. Purpose

- 1.1 The University will reimburse successful applicants for key staffing vacancies, at least in part, the financial cost of relocating to within daily travel distance of the University.
- 1.2 Human Resources (Payroll) are responsible for providing advice and guidance to managers and employees, including determining eligibility on the application of this policy and procedure.
- 1.3 It is a condition for receiving relocation assistance that all the terms and conditions of this policy are accepted by the employee.
- 1.4 The policy is effective for jobs advertised after 1 November 2016. It supersedes all previous University relocation policies.

2. Eligibility

- 2.1 Relocation assistance applies to specified roles where it has been determined in advance that the role may be difficult to fill and that it is appropriate for the University to offer an incentive to attract candidates from outside the region.
- 2.2 The School/Service and Human Resources must agree in advance that a role is eligible for relocation assistance and this should be stated in the job advertisement and/or other recruitment paperwork.
- 2.3 Where it has been agreed that a new employee can claim relocation assistance, the following conditions must also apply: -
 - The contract must be open-ended or for a fixed term of over 3 years' duration;
 - The present home must be more than 35 miles away from the work location at which the employee will be based;
 - The new home must be within 35 miles of the new work location and be a move of more than 5 miles;
 - The move must be made and the new home must become the main or sole residence.

3. Assistance Available

- 3.1 The policy provides a maximum amount claimable and is intended to cover a proportion of the additional costs actually incurred under Section 4 below.
- 3.2 The maximum amount of relocation assistance provided by our University is 10% of gross annual starting salary, up to the HMRC maximum of £8000.
- 3.3 HMRC rules restrict the total tax and National Insurance exemption allowable per house move to £8000.

4. Costs Covered

- 4.1 Our University will reimburse the following categories of expenditure: -

- Costs of transporting furniture and personal effects, including insurance*
- Professional fees incurred in connection with the selling of the old residence and the purchase of a new residence e.g. Estate agent's, surveyor's or legal fees, stamp duty;
- Storage costs where a permanent move cannot be made immediately; *
- The cost of additional temporary accommodation for the employee for up to 3 months where a permanent move cannot be made immediately;
- Travel expenses for the employee and dependants, both during the move and when house hunting (our University's standard mileage rate will apply).
- The cost of any unexpired lease where a tenancy is involved.
- For employee's relocating from overseas, one economy class or equivalent air fare for the employee and his/her immediate accompanying family.

*Three competitive quotes should be obtained. Leeds Beckett University will reimburse the lowest of the three quotes; however, it is at your discretion which quotation is accepted.

- 4.2 It should be noted that if a rented property is to be the permanent new home, then the rent will not qualify as a cost of relocation and will not be reimbursed.

5.0 Application and Claims Procedure

- 5.1 Where an employee wishes to apply for relocation assistance, an application form (Appendix 1) should be completed, authorised by the School/Service budget holder and submitted to Payroll within 2 months of the employee's University start date.
- 5.2 The application for payment of relocation assistance must be authorised by the Director of Human Resources or nominee.
- 5.3 Payroll will forward a questionnaire to the employee and confirm approval or otherwise of the request for relocation assistance. A meeting will be arranged with the employee to discuss the terms of their claim.
- 5.4 Following the approval of an application, claims for relocation assistance should be submitted to Payroll on the Relocation Expenses Claim Form (Appendix 2) and must be accompanied by original, valid VAT receipts and in the name of the employee only.
- 5.5 Claims should be submitted on a regular basis and within two months of the date of expenditure itself.
- 5.6 Expenses will be paid via your monthly salary and claims should be submitted prior to the payroll deadline for payment within the same calendar month.

6.0 Recovery of Relocation Assistance

- 6.1 Any payments made under this policy will be recoverable if the relocation is not made within one year of taking up appointment. In the event that an employee claims relocation assistance but does not relocate, the employee will be asked to repay the amount of relocation assistance provided.

- 6.2 An employee leaving our University before the completion of three years' service will be required to repay relocation assistance on the following basis: -

Period of service (from start date of employment)	Amount to be repaid (as % of total amount paid)
During the first year	100%
After the first year but before 18 months	75%
After 18 months but before two years	50%
During the third year	25%

- 6.3 Repayment will not be required if the reason for termination of employment is redundancy.
- 6.4 Any monies owed at the employee's date of leaving our University will be deducted from their final salary and any outstanding amount will be considered a debt owed to our University for which the employee will be billed.

7. Application of Policy

- 7.1 Leeds Beckett University retains the discretion to adjust the amount of relocation assistance in individual circumstances. Relocation assistance is discretionary and it is not a contractual entitlement. Leeds Beckett University reserves the right to withdraw it at any time.

8. Related Policies and Documentation

Recruitment and Selection Policy and Procedure
Staff Expenses Procedure

HM Revenue & Customs guidance: <http://www.hmrc.gov.uk/guidance/relocation.htm>

Name:		Title:	
Pay Number:		NI Number:	
Date of appointment:		Job Title:	
Faculty/Service:			
Previous Home Address:			
	Do/did you own <input type="checkbox"/> or rent <input type="checkbox"/> this property (please tick as appropriate)		
New Home Address:			
	Please tick to confirm this is your main residence <input type="checkbox"/>		
Please tick to confirm that no other member of your household has claimed relocation expenses as a result of your move <input type="checkbox"/>			

Employee Declaration

I confirm that I have read and understand our University’s Relocation Policy and Procedure and accept the relocation assistance offered to me under the terms of this scheme.

In accordance with the provisions of the scheme, I agree to repay Leeds Beckett University all or part of the amount claimed if I leave the organisation within 3 years of appointment, if the relocation is not completed within 12 months of appointment, or, in the event that my circumstances change and I do not relocate.

If I leave the University, the money will be deducted from my final salary and any outstanding amount will be considered a debt owed to Leeds Beckett University which I will be billed for and must make good.

Signed: **Date:**

Authorisation from School/Service Budget Holder

Before submitting your application form, please ensure that this form is authorised by your School/Service budget holder and a Finance project code is obtained.

Signature of budget holder:		Project code:	
Print name:		Tel Ext:	

Please send your completed form to Payroll, Room G01, Leighton Hall, Headingley Campus, or by email to: payroll@leedsbeckett.ac.uk

Payroll Use

Signature of Director of Human Resources

Date:

Eligibility and authorisation checked	
Date acknowledgement letter sent	
Upload application form and letter to Serengeti	

APPENDIX 2

RELOCATION EXPENSES CLAIM FORM

Notes

- Before completing this form, please read our University’s Relocation Policy and Procedure
- Please attach original, valid VAT receipts in your name for all expenses claimed
- Claims should be submitted on a regular basis and within 2 months of the date of expenditure itself
- If you have any questions in relation to your claim, please email: payroll@leedsbeckett.ac.uk

Surname:		First Name:	
Payroll Number:		NI Number:	
Date of appointment:		Job Title:	
Faculty/Service Area:			

Details of Expenditure

Type of Expenditure	Amount (£)	Receipt Attached (*and 3 quotations where appropriate)
Cost of preliminary visits (i.e. transport costs & overnight accommodation)		<input type="checkbox"/>
Removal costs*		<input type="checkbox"/>
Storage costs *		<input type="checkbox"/>
Temporary accommodation costs (e.g. rent)		<input type="checkbox"/>
Legal costs		<input type="checkbox"/>
Travel expenses		<input type="checkbox"/>
Other (Please specify)		<input type="checkbox"/>
TOTAL RELOCATION CLAIM		
Actual amount approved for payment (to be completed by Payroll)		
Total Claim to date (to be completed by Payroll)		

*Three competitive quotes should be obtained. Leeds Beckett University will reimburse the lowest of the three quotes; however it is at your discretion which quotation you accept.

If you are claiming for temporary accommodation/commuting costs, please provide evidence that your existing property is on the market with your first claim for reimbursement; with each subsequent claim, please tick here to declare that your property is still on the market.

Employee Declaration

I confirm that the above particulars are correct, that the expenditure has been incurred and that the claim is made in accordance with our University’s Relocation Policy and Procedure. In accordance with the provisions of the scheme, I understand that if I resign before completing 3 years in the service of our University I will be required to repay the expenses in whole or in part as set out in Section 6.2 of our University’s Relocation Policy and Procedure.

Signed: **Date:**

Please send your completed form, together with all original receipts to Payroll, Room G01, Leighton Hall, Headingley Campus, or by email to: payroll@leedsbeckett.ac.uk

Payroll Use

Total amount authorised for payment	
Date claim processed	
Date of reimbursement (month)	
Remaining claim allowance	