

### Policy Statement

1. Employees are required to live within normal daily travelling distance of the University (20 miles) except with the express permission of the Director of Human Resources. The University will support new employees to relocate to the area, recognising the practical and financial challenges associated with relocation. This Policy;
  - sets out the criteria and conditions which apply to new employees who wish to make a claim for relocation expenses;
  - ensures that financial assistance is applied in a consistent manner;
  - provides assistance to staff who relocate in order to take up an appointment with the University;
  - provides assistance to all eligible staff in a consistent manner;
  - provides advice and guidance to all involved in the process.

### Eligibility

2. New employees moving to within daily travelling distance (20 miles) of the place of work (except with the express permission of the Director of Human Resources).
3. The move must be made within 12 months of the start date of employment with the university.
4. Claims must be made before the end of the tax year after the one in which the move took place.
5. Where more than one member of the household is appointed to the University, only one claim for reimbursement (up to the maximum of £2,000) will be accepted. In exceptional circumstances the Director of Human Resources may approve the reimbursement of additional costs however this should be agreed at the point in which the offer of appointment is made and included in the employee's contract of employment.
6. Claims cannot be made in advance of the date on which the appointment commences and no advances will be made.
7. Relocation costs for externally funded posts must be coded and claimed from the source grant. Where the grant does not cover this cost, relocation expenses may not be claimed.

### Application and approval process

8. New employees who meet the above criteria and wish to claim relocation expenses should submit the following documentation for each claim to the Human Resources department:
  - a standard claim form for the reimbursement of relocation expenses within twelve months of the commencement of employment;
  - the agreed number of quotations (see paragraph 9)
  - Receipts for all expenses incurred, in the name of the employee, which show the company number/VAT number where available.

### Level and type of Relocation Expenses which can be claimed

9. The maximum amount that may be reimbursed is £2,000. This figure will be reviewed as required by the Executive and Finance & Strategy Committee. The Relocation Expenses Policy covers the reimbursement of the following expenses:
- the employee's sale of their existing place of residence;
  - the costs associated with the employee's purchase of a new residence in line with Point 2 above;
  - transporting the employee's belongings to the new residence. Please note that 3 competitive tenders should be obtained in writing and submitted with the claim;
  - associated travel costs for you and your family
  - bridging loans.
10. The Relocation Expenses Policy does not cover the following expenses:
- utility bills e.g. electricity, water, gas, Council Tax;
  - deposits on rented accommodation (due to the fact that this will be reimbursed directly to the tenant at the end of the tenancy agreement);
  - re-direction of mail;
  - subsistence costs except where breakfast is booked as part of B&B arrangements;
  - travel expenses to and from the appointee's existing place of residence to Aberystwyth University once the appointee's employment has commenced;
  - domestic goods for the new premises.

**Please refer to the 'Guidance Notes for Claiming Relocation Expenses' for further information relating to which expenses may be claimed in accordance with the University's Relocation Expenses Policy. However, please note that this is not an exhaustive list and that where an individual is unclear as to whether an item may be claimed, guidance should be sought from the Human Resources department prior to committing to the expenditure.**

11. Employees claiming relocation expenses must declare that no other relocation expenses have been, or could be claimed, by the member of staff concerned or some other person in respect of the relocation.

### **Repayment of Relocation Expenses**

12. If either the member of staff or the University terminates the employee's contract of employment or the contract ends, within a three year period, a repayment schedule of 1/36<sup>th</sup> per incomplete month will be applied in relation to relocation expenses already paid.

Please note that prior to the employment ending, agreement between the employee and the University must be reached in relation to how any monies owed will be repaid.

### **Variations to the Policy**

13. The Director of Human Resources has the authority to vary arrangements for relocation expenses in exceptional circumstances.

### **Sources of Further Guidance:**

- 14.
- The University's 'Guidance Notes for Claiming Relocation Expenses'
  - Inland Revenue Booklet "Income Tax and National Insurance contributions on expenses or benefits paid in connection with relocation"
  - [www.inlandrevenue.gov.uk](http://www.inlandrevenue.gov.uk)
  - Human Resources Department.