

THE UNIVERSITY OF BOLTON

RELOCATION POLICY

1.0 Purpose

The University of Bolton aims to recruit the most talented individuals in key posts in order to support Bolton's strategic agenda of being a platinum, teaching intensive and research informed HEI. This policy is intended to support this aim by providing assistance to senior employees who have to relocate to take up a position.

2.0 Scope

This policy applies to staff appointed to a Professorial or Senior Manager position on an open-ended contract or to a fixed term position of two years or more, who have to relocate their place of residence in order to take up the appointment and where a relocation package has been offered during the appointment process.

Staff employed in other roles are not eligible as the University would normally expect to recruit from within the North West region. However, at the University's discretion the policy may be applied in particular cases.

This policy covers the removal of domestic items only.

Variation of this policy and the terms within are at the discretion of the HR Director and the Vice-Chancellor.

3.0 Eligibility

To qualify employees must fulfill all of the following criteria:

- The expected duration of their employment with the University should be at least two years.
- The employees' existing home is not within reasonable daily travelling distance (i.e. is more than the greater of either a distance of 35 miles or a 45 minute one way commute to the University).
- The employees' new home is within a reasonable distance from the University (i.e. within the lesser of either a 20 mile distance or a 30 minute one way commute to the University).
- Any claim must be made within 12 months from the date employment at the University commenced.
- Neither they nor their partner is in receipt of a relocation package from another organisation.

4.0 Relocation Support

The University will provide a relocation allowance of up to 10% of basic salary (capped to a maximum of £8,000) to contribute toward reasonable relocation expenses as set out in the offer of employment.

In addition the University will also grant the Employee up to two days paid relocation leave to assist employees in their move. This should be agreed in advance with the line manager.

Under this Policy reimbursement of reasonable expenditure may be claimed for items which:

- qualify for exemption of tax and Class 1A national insurance contributions (NIC) in accordance with HMRC rules (as updated from time to time),
- are made in connection with relocating one's main residence,
- are up to the Relocation Allowance as stated in the offer of appointment letter.

The Relocation Allowance can be used for the following:

- cost of moving and/or storing furniture and household effects
- insurance of domestic belongings in transit or in store
- cost of member of staff and family travelling from existing to new residence (standard class travel)
- fees connected with house sale or purchase, including stamp duty
- disconnection/connection of public utilities
- maintenance, insurance and security of existing residence while unoccupied pending disposal
- bridging loan interest
- cost of temporary accommodation or travel prior to moving main residence
- travel and subsistence costs of one trip for house-hunting by the employee and his/her family
- costs of replacing limited domestic goods such as carpets, curtains and white goods if they cannot be moved.

The Relocation Allowance may not be used for any expenses which do not qualify for tax and NIC liability exemption, in accordance with HMRC guidance, including:

- mortgage or housing subsidies if the employee moves to an area of higher housing cost
- interest payments for the mortgage on the employee's existing home
- re-direction of mail
- Council Tax bills
- purchase of new school uniforms for employee's children
- compensation for losses such as:
 - having to give up a part-used travel season ticket
 - cost of joining a new sports or social club
 - penalty for giving insufficient notice of a child's withdrawal from school

Should employees have any questions regarding this Policy they should speak with a member of the HR team. Further information on HMRC guidance can be found at:

<http://www.hmrc.gov.uk/guidance/relocation.htm>

5.0 Repayment of Allowance

Should the individual voluntarily leave from the University within two years of commencing employment with the University, they will be required to repay a proportion of the reimbursed expenses. This amount will decrease by 1/24 for every month of service completed. Any amount to be repaid may be deducted from an employee's final salary payment.

6.0 Claiming Expenses

Requests for payment must be submitted to Human Resources using an Expense Form. All claims must be supported by original receipts and evidence that a house move has actually taken place.

V1. Human Resources
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