

Relocation Guidance note

1. Introduction

This guidance note sets out the University of Stirling's provisions regarding relocation. Relocation assistance is discretionary, it is not a contractual entitlement and the University reserves the right to withdraw it at any time. Assistance is judged on a case-by-case basis and each employee's situation and circumstances will be unique. The University therefore retains discretion to tailor the relocation package to suit the particular circumstances and needs of each employee. However, the University will always act fairly and in a non-discriminatory manner.

2. Purpose

The purpose of this guidance note is to help with out-of-pocket expenses incurred when an employee relocates as a result of his/her employment with the University.

3. Eligibility

To be eligible for relocation assistance, the employee must;

- Be living more than 60 miles away from his/her work location.
- Be moving to a new base because of accepting an offer of employment with the University.
- Be moving within 60 miles from their base campus location, as detailed within their contract.
- The initial appointment must be for at least 2 years.
- The job must be one for which recruitment from within the local area would not normally provide a sufficient applicant pool for consideration.
- Claims should normally be made within 12 months of taking up appointment.

Relocation assistance will be provided to only one employee at the same residence.

4. Authorisation

The offer of relocation assistance is the decision of the Dean of Faculty/Service Director in discussion with HR Partner and is conditional upon the eligibility criteria detailed above being met.

Once agreed the relocation assistance should be notified to HR within the offer of appointment form (normally via Talentlink). Employee's eligible to claim relocation costs will be notified of this within their letter of appointment including the confirmation of the maximum costs.

5. Amount available

The maximum level of relocation assistance provided by the University will not normally exceed 1/12th of gross starting salary. This amount is not a lump sum but can be reimbursed for eligible expenditure as set out below against valid receipts and invoices.

Employees are required to moderate all expenses involved in their relocation and expenses will be reimbursed only if they are deemed to be reasonable. Assistance is available to provide a contribution to the cost of relocation only and is not intended to meet fully all costs associated with relocation, although it may do so in some circumstances.

6. Taxation

All offers of relocation are subject to HM Revenue & Customs regulations; further information is available from [HMRC's web site](#).

7. Qualifying Expenses

The University may reimburse reasonable expenses under the following categories;

- the employee's purchase and sale of property
 - estate agent fees
 - legal fees
 - temporary rental costs to bridge the move (maximum 3 months)
- transporting the employee's belongings to the new residence
(3 quotes are required - The University reserves the right to reimburse at the lower estimate)
 - packing & unpacking
 - storage
 - removal transport
 - removals insurance
- associated travel and subsistence costs (within pre-agreed limits)
 - travel to visit new location
 - travel on the day of the move

Excluded expenses;

- transporting office equipment or belongings
- mortgage payments
- household bills

8. Repayment of relocation assistance

Employees will be offered relocation assistance only if they agree to repay the amount given by the University in the event that their employment voluntarily terminates within two years from the start date of employment. Those offered relocation assistance will be required to sign an agreement to this effect (appendix 1). The amount payable is reduced proportionally and is as follows:

Period of service (from date of employment)	Amount to be repaid (as % of total expenses)
Leaving 0-12 months	100%
Leaving 13-24 months	50%

Repayment will not be required if the reason for termination of the employee's employment is redundancy. In the event that the employee does not relocate, he/she will be asked to repay all or part of any relocation assistance given.

9. Making a claim

Employees must obtain written agreement of HR prior to committing to any spend; requests should be e-mailed to hrsec@stir.ac.uk. Relocation expenses must be claimed on the University relocation claim form (appendix 2) which should be countersigned by the employee's line manager and supported by valid receipts.

All relocation expenses must be claimed within 12 months of taking up the appointment with the University unless otherwise agreed with the University Secretary and Director of HR. It should be noted reimbursement will not occur prior to the start date of employment and only 1 claim form will be accepted.

10. Funding

Relocation expenses for core funded posts will be reimbursed from the University relocation budget managed by HR & OD. Agreed relocation costs above the standard maximum amount, for externally funded posts or for expenses outwith the guidance must be met from Faculty/Service budget.

Relocation Assistance - Repayment

Full Name (known as)		Employee Number	
Faculty/Service		Start date	

The University guidance on relocation assistance requires that you confirm your acceptance of the repayment agreement by signing and returning this copy of the agreement.

Period of service (from date of employment)	Amount to be repaid (as % of total expenses)
Leaving 0-12 months	100%
Leaving 13-24 months	50%

Form of Acceptance

I accept the conditions of the above repayment agreement and agree that any outstanding repayment will be deducted from my final salary payment if necessary.

Signature		Date	
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*Please return to:-
HR & OD Services
Cottrell Building (Room 4B1)
University of Stirling
Stirling FK9 4LA*

HR ACTIONS	
<ul style="list-style-type: none"> • Copy saved to file • Relocation record updated to allow for payment of expense claims 	
HR Office Signature:	Date:

Relocation Assistance – Claim form

Full Name (known as)		Employee Number	
Faculty/Service		Start date	
Address relocated from			
New address			
I confirm this is my main residence <input type="checkbox"/>			

Please attach receipts and supporting documents for all expenses claimed.

For removal claims please provide copies of quotations.

Date cost incurred	Details	Amount (£)
Total relocation claim		

Employee declaration

I declare that expenses claimed are in accordance with the rules and eligibility criteria set out in the University’s Relocation guidance and no other claim has or will be made for this expenditure. I agree to and have provided a signed copy of the University’s relocation assistance repayment agreement.

Employee Signature		Date	
Line Manager Signature		Date	

<p>HR ACTIONS</p> <p><input type="checkbox"/> Relocation assistance repayment agreement on file</p> <p><input type="checkbox"/> Budget sheet updated</p> <p><input type="checkbox"/> Request submitted to Finance for payment</p> <p>HR Office Signature: _____ Date: _____</p>	
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