

RELOCATION EXPENSES POLICY

The University will assist with relocation expenses as outlined below:

- assistance will be granted to any employee who needs to relocate upon taking up an appointment with the University, provided they meet the conditions and eligibility criteria outlined, or
- assistance will be granted to any employee who is required by the University to move as a condition of his/her appointment.

1) Staff Eligible

Without term and fixed-term, for a period of 3 years or more, lecturers/academic staff.

Without term and fixed-term, for a period of 3 years or more, support/administrative staff on grades RU06 and above (or equivalent).

Assistance for anybody below grade RU06 will be at the discretion of the Principal Budget Holder.

Assistance will NOT be granted in any case where an appointment is temporary or made for a fixed term period of less than 3 years. In the event of any subsequent appointment to a permanent post, the normal conditions will apply, subject to the time criteria in 2d) below applying from the date of the original fixed-term or temporary appointment.

The Conditions at Section 2 below will also apply.

If you think you are eligible for assistance with location expenses please discuss with the Head of Department to which you are applying, who will give agreement in principle (having first checked with the budget holder if they are not the budget holder).

2) Conditions

- a) The move must be from one main permanent residence to another; this may be rented accommodation.
- b) The location of the new residence must be acceptable to the University as being sufficiently accessible to Roehampton to enable the postholder to properly fulfil his/her duties – normally within 30 miles of the University.
- c) The minimum distance for any move will normally be 30 miles, although travelling time will be taken into account and the distance may be lowered; e.g. a move across London may be justifiable under these circumstances.
- d) The move must normally be completed within 1 year of the date of appointment.

- e) Applicants will be required to obtain 2 written quotations for expenses. Any assistance granted will be based on the cheaper quotation unless prior approval has been given by the University to accept the dearer quotation.
- f) In the event of the postholder leaving the University within 2 years of taking up the appointment, he/she shall repay to the University the whole amount of any assistance received. If the postholder leaves between 2 and 3 years of appointment he/she shall repay to the University one third of the whole amount of assistance received. The postholder will be required to complete a form of authority (before any allowance is paid) to enable the University to recover the allowance from salary installment(s) prior to the date of leaving service. An exception will be made in cases of redundancy or ill-health retirement.
- g) The employee must declare if any claims have been made elsewhere (e.g. to a partner's employer).

3) Limit of Assistance

The maximum expenditure which can be reimbursed to any individual employee will be £3,000.

4) Items for which assistance may be provided

Removal costs; storage fees (for a maximum of 3 months); legal fees in connection with sale and/or purchase; estate agents fees; expenses in connection with a mortgage or loan including guarantee and survey fees.

Reasonable lodging allowance and/or weekly travelling expenses to and from home may be paid at the discretion of the Principal Budget Holder for a period of 3 months from the date of appointment, subject to proof that the applicant's house is on the market. The Budget Holder will review the situation after 3 months and has the discretion to approve payment for a further 3 months. This allowance will be part of the maximum £3,000 allowed.

Guidance and further details on what expenses and benefits may qualify for exemption can be found on the [HMRC web-site](#).

5) Making a Claim

If prior approval has been given, claims for reimbursement through this scheme, supported by appropriate receipts, vouchers and other acceptable documents, should be made through the budget holder.

Budget holders, having approved payment, should pass the claim to Human Resources with the appropriate code(s) to which amounts are to be charged.

Any departure from the normal rules outlined in 1 to 4 above will be at the absolute discretion of the principal budget holder, and subject to falling within the rules on tax liability*

* NOTE: In order to be exempt from tax:

Expenses must be incurred by the end of the tax year following the year in which the job change takes place. The new residence must be within a reasonable distance of the normal place of work, and the old must not be within reasonable travelling distance.