

## RELOCATION POLICY FOR NEW EMPLOYEES

### 1. PURPOSE

To provide appointments at a senior level with an allowance to claim for reasonable relocation expenses incurred as a result of a change in their place of residence, either within the United Kingdom or from overseas (outside the UK) to the UK.

The allowances detailed in this document may be modified at the discretion of the Director of People Performance & Culture (PPC) in conjunction with the Executive Board.

### 2. SCOPE

This policy applies to new employees taking up employment with the University at the grades as listed in section 10.

Consideration may be given to any strong business case put forward by the relevant Head of area or Service Director for individuals who fall outside this criterion. Approval of the Director of PPC and Executive Board would be required in such circumstances.

The University reserves the right to apply or vary this policy although any variation must accord with the University's commitment to equality of employment opportunity. The benefits specified are the maximum allowable. HM Revenue & Customs (HMRC) limits and requirements may also affect eligibility and entitlement.

### 3. ELIGIBILITY

Relocation allowance will be entirely at the discretion of the University and will only be offered where:

- < the skills and expertise required to satisfactorily perform the job are not readily available within the local regions, and
- < a job offer has been made to an individual who, in the view of the University, lives outside the limits of practical travelling distance or time to fulfil the requirements.





The University will meet all reasonable estate agent fees and expenses incurred in selling the existing property, subject to the overall limit.

### **Valuation, survey, building society/bank and legal fees**

Eligible items under this heading include house surveys, mortgage indemnity and mortgage redemption fees, subject to the overall limit.

### **Utility disconnection and connection charges**

Charges incurred in disconnection and reconnection of utilities (ie gas, oil, electricity, water and telephone) at the old and new home will be covered, subject to the overall limit. This does not apply to the provision of new utilities.

### **Travel and Subsistence**

The employee is entitled to travel for:

- < Preliminary visits to the new location
- < Temporary living accommodation – where the individual intends to move to permanent accommodation to complete the relocation but moves into a temporary property until the old home is sold and/or the new purchase completed.
- < Travel between the old home and new work location
- < Travel between the old home and temporary living accommodation
- < Subsistence in line with the University's Expenses Policy

Members of the employee's family may be entitled to travel for preliminary visits to the new location and travelling between the old home and new home when the move takes place.

### **Visa costs**

The University provides a Visa Loan Scheme to support employees with the cost of visa applications and associated charges (such as the NHS Health Surcharge which is not allowable expenditure under this policy).

Where individuals require financial assistance to submit their online Visa and NHS Health Surcharge applications, the University offers an advance payment of the cost. For further information please refer to the Visa Loan Scheme and Application form which is available from PPC's portal page or on request to [payrollservices@lincoln.ac.uk](mailto:payrollservices@lincoln.ac.uk)

The employee may however claim the cost of their visa and that of their dependents from the relocation allowance. This does not include the cost of renewals or the NHS Surcharge.

## **6. UNALLOWABLE RELOCATION EXPENDITURE**

Some specific expenditure is strictly **excluded** from reimbursement. Examples of these, from HMRC guidance, are given below:

- < Visa renewal costs and Leave to Remain application fees
- < NHS Surcharge
- < Costs of disconnection/reconnection of electrical or other household appliances
- < Cost of replacing or purchasing new furniture or other household items or domestic goods
- < Any household cleaning at the old or new property
- < Associated costs incurred in obtaining visas/passports
- < Removal of motor vehicles, livestock or pets
- < Payment of council tax and day to day utility costs
- < Compensation for any loss of sale on the employee's home
- < Re-direction of mail
- < Interest payments for the mortgage on the employee's existing home



