

Note: the relocation assistance scheme for new appointments is not a contractual benefit. The University will exercise its discretion whether to offer relocation assistance to new appointments. Where relocation assistance is offered, this will be detailed in the letter of appointment.

- 1 All members of staff are expected to live in a location compatible with the fulfilment of their duties. Members of staff should advise their School/Service and Personnel and Staff Development of any changes to their home address and telephone number.
- 2 A successful applicant to a post paid on grades E and above who lives more than an hour away from their University work location (as notified in their letter of appointment) may be offered assistance with their relocation to an address significantly closer to their University work location.
- 3 Staff taking up an offer of relocation assistance will normally be expected to move to an address that is within 30 miles and 45 minutes commuting time of their University work location. Exceptions to this must be agreed in advance with the Head of School/Service and the Director of Personnel and Staff Development.
- 4 The maximum sum which can be claimed in respect of relocation assistance will be specified in the letter of appointment. There will be a lower rate of assistance for short-term appointments. New employees to appointments for an initial fixed term of up to and including one year are not eligible for relocation assistance.
 - For new employees to appointments which are open-ended or for an initial fixed term of more than three years, staff may claim the actual costs of relocation up to a maximum of 10% of their starting salary or £8,000 (whichever is the lower).
 - For an appointment for an initial fixed term of more than one year and up to and including two years, there will be an rate of assistance of 50% of above sum; for more than two years and up to and including three years, the rate of assistance will be 75% of above sum.
- 5 The University anticipates that relocation expenses reimbursed will fall within the categories which HM Revenue & Customs (HMRC) allows to be paid without a charge to tax. It is therefore expected that this assistance will contribute to the following expenses:
 - the cost of the removal of household effects, including books, to the employee's new home*.
 - in the case of appointees from overseas, one adult economy fare from the appointee's place of residence.
 - the costs of storage (where it is not possible for the employee to move immediately into their new home);
 - legal and estate agent fees connected with the sale and purchase of residence;
 - survey fee on the property which is finally purchased;
 - the disconnection and reconnection of appliances, including telephone installation/transfer charges;
 - relaying carpets. (Note: HM Revenue & Customs will not permit any expenses relating to new carpets.)

(This is only a brief summary of the expenses which are covered by HM Revenue & Customs regulations: you should contact Personnel & Staff Development for clarification before submitting your claim.)
- 6 To meet HM Revenue & Customs regulations, which allow the payment of relocation expenses without taxation being incurred, all claims for payment must be accompanied by proof of expenditure (ie receipt).

- 7 In addition, current HM Revenue & Customs rules require that the sum has to be claimed by the end of the tax year following the commencement of your new appointment. (For example, if you started your new job in October 2007, you must have reclaimed your relocation costs under this scheme by the end of the 2008/9 tax year.)
- 8 The HM Revenue & Customs rules also restrict the allowance to the move of one home. Consequently, where a couple (whether married, in a civil partnership or cohabiting) are both appointed to positions at the University, only one will be entitled to relocation assistance under this scheme. Where this applies, the new appointees should confirm with Personnel & Staff Development which partner is covered by this scheme.
- 9 In view of the significant costs involved in providing relocation assistance any member of staff who resigns from their post within the first three years of commencing their appointment will be required to repay a percentage of the money that they have received according to the following scale:
- Resignation during first year: 75%
 - Resignation within second year: 50%
 - Resignation within third year: 25%
- The sum must be repaid to the University no later than the final day of employment and will be deducted from their final salary payment. (Should this be insufficient to cover the outstanding debt the individual will reimburse the University immediately by some other means acceptable to the University).
- 10 Claims should be submitted to the School Manager (for staff in Schools) or Personnel Manager for Professional Services, using the University's standard staff expenses claim form (available from the Finance Services website at www.admin.exeter.ac.uk/finance – follow the link for documents/forms).
- 11 Different arrangements apply to appointments in the Peninsula College of Medicine and Dentistry.
- * While you have discretion over which removal firm to use, you should note that the University's preferred supplier is Rose Removals – contact info@roseremovals.co.uk or 01363 83700 stating that you are a new member of staff and quoting the vacancy reference number for your appointment.