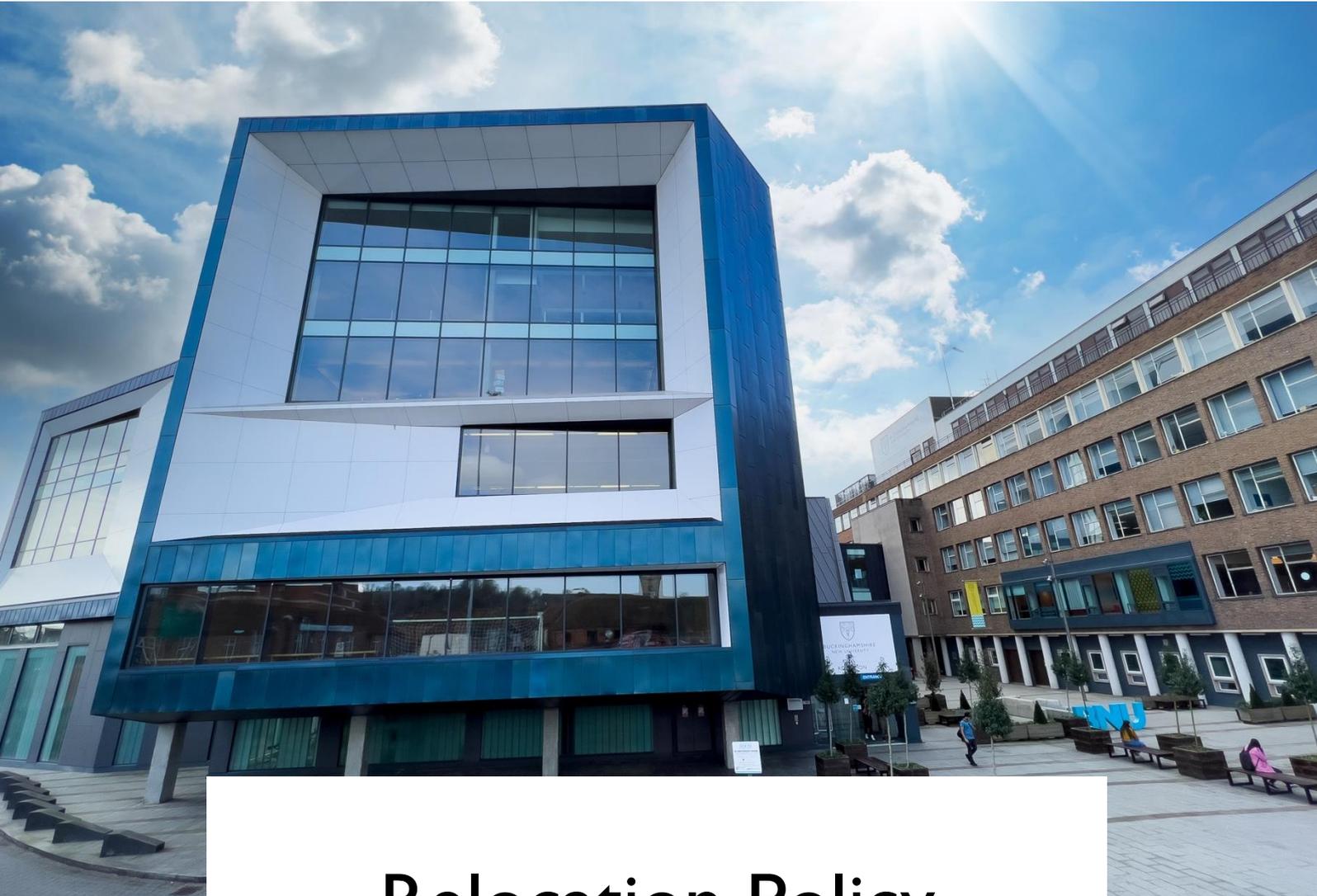




BUCKINGHAMSHIRE  
NEW UNIVERSITY

EST. 1891



# Relocation Policy

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This document has been designed to be accessible for readers. However, should you require the document in an alternative format please contact the University Secretariat.

## Purpose

1. The purpose of this policy is to provide financial assistance for new employees joining the University who have had to relocate to take up their position. The relocation package is offered as a contribution towards the costs of relocating.

## Applicability and Scope

2. The Policy is available to employees who are:
  - New to the university;
  - Grade H or higher – some exceptional cases where lower grades may be applicable such as unable to appoint, this will be reviewed on a case by case basis;
  - Currently living outside of what is a reasonable travelling distance to the University, (for guidance purposes this would normally be more than 40 miles from the University) and move within 25 miles of the University, with the new home becoming their main place of residence;
  - Contracted for at least 2 years;
3. Relocation claims must be completed before the end of the tax year (5 April) after the one in which the employee took up their new position;
4. The employee must change their main residence;
5. The distance will be calculated based on the main location as per the contract of employment;
6. There is no other source of funding assistance available to the employee via a grant or where included in the annual remuneration, through the partner or other member of the household. The [HMRC rules](#) restrict the allowance to the move of one home;
7. If two colleagues who reside in the same residence are both appointed to roles and are relocating to take them up the University will only reimburse one set of costs. Please speak to HR about who can claim the relocation entitlement.

## Policy

8. Relocation expenses will be reimbursed for those both renting and buying accommodation up to a maximum of £8,000. [‘Qualifying’](#) costs can be claimed for and include;
  - the costs of buying or selling a home
  - moving costs
  - buying certain things for a new home
  - bridging loans
9. This amount is not a lump sum but can be reimbursed for eligible expenditure against valid receipts and invoices.
10. All offers of relocation are subject to HM Revenue & Customs regulations. As the relocation is job related, the first £8,000 is exempt from tax provided that certain conditions are met. Relocation costs above £8,000 are a taxable benefit.

11. Relocation assistance is discretionary. It is not a contractual entitlement, and the University reserves the right to withdraw it at any time.
12. HMRC has a time limit of relocation, whereby relocation claims must be completed before the end of the tax year (5 April) after the one in which the employee took up their new position. In line with the [expense policy](#) all relocation expenses must be claimed within 3 months of the expense being incurred by the employee. They do not need to submit all their expense claims in a lump sum and can be submitted as they are incurred.
13. For guidance on what relocation expenses can be claimed please look at the [HMRC website](#).
14. The University will not cover costs that are non-exempt, for guidance on these please look at the [HMRC website](#).

## Repayment if you leave BNU

15. The University is committed to reimbursing relocation expenses if an employee meets the eligibility criteria.
16. If the recipient's employment terminates for whatever reason, within two years of the date of reimbursement of the relocation expenses, they will need to repay BNU the expenses as per the table below.

<b>Period of Service on leaving date (from date of payment of expenses)</b>	<b>Amount to be repaid (as % of total payments made)</b>
0 – 6 months	100%
7 – 12 months	50%
13 – 18 months	25%
19 – 24 months	Reducing from 25% by one-sixth of 25% for each completed month up to 24 months

17. The Human Resources Director and the Chief Finance Officer can waive a recipient's repayment of their expenses at their discretion.
18. The recipient will be asked to sign to these terms as per the [Relocation Agreement Form](#).
19. The University reserves the right to deduct any amount of Relocation Expenses repayable by the employee under this clause from their salary or other sums due to them under their contract (to include, without limitation, any payment in lieu of notice, holiday pay or sick pay). The deductions may be made in several instalments over a period of time at the University's discretion. The employee agrees to repay any amount outstanding at the date of termination of their employment over a period of time to be determined by the University.

## Process for claiming

20. If you are eligible for relocation expenses, please speak to your HR Business Partner and Line Manager.
21. Once determined you are eligible you will be sent the [relocation agreement form](#) to complete and return.

22. Upon HR confirming they have received your relocation agreement form you will need to complete the [relocations expense claim form](#) and return it to HR.
23. HR will then liaise with the Head of your School or Directorate and the Director of HR for approval.
24. Once HR has the required approvals, HR will send the form to Payroll who will pay the expenses in your next pay, in line with the [payroll timetable](#).

## **Responsibilities**

25. The budget holder for the Directorate/ School and the Director of HR must approve the expenses before they are paid.
26. The employee must submit their expense claim and submit a valid receipt within 3 months of the expenditure in line with the [expense policy](#).

# Relocation Agreement Form

(Once completed please return to the Human Resources Directorate ([humanresources@bnu.ac.uk](mailto:humanresources@bnu.ac.uk)))\*

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In consideration of the University agreeing to pay my expenses relating to relocation assistance under the terms of the Relocation Policy, I agree to reimburse to the University the whole or part of the relocation expenses if:

- my employment is terminated by the University for any reason (other than compulsory redundancy) within two years from the date of payment of the relocation expenses; or
- I resign from the employment of the University within two years from the date of payment of the relocation expenses.

For these purposes, the assessment of the two-year period relates to the effective date of the termination of my employment and not to the date of my notice of dismissal or resignation.

I accept that the amount that I will be required to repay will be reduced proportionally as follows:

<b>Period of service (from date of payment of expenses)</b>	<b>Amount to be repaid (as % of total expenses)</b>
Leaving 0-6 months from date of expenses paid	100%
Leaving 7-12 months from date of expenses paid	50%
Leaving 13-18 months from date of expenses paid	25%
Leaving 19-24 months from date of expenses paid	Reducing from 25% by one-sixth of 25% for each completed month up to 24 months

I agree that the University may deduct a sum equal to the whole or part of the relocation expenses due under the terms of this agreement from my final salary payment and/or from any other allowances, expenses or other payments due from the University to me.

If my final salary payment and/or other sums otherwise owed to me by the University are not sufficient to meet the debt, I agree to repay the outstanding balance of the relocation expenses to the University within one month of the date of the termination of my employment.

After two years have elapsed from the date of payment of the relocation expenses, I acknowledge that I will not be required to repay any part of those expenses if I am still employed by the University on that date.

In the event that I do not relocate but remain employed by the University, I agree that I will repay the relocation expenses in full (or such part of the relocation expenses as the University may in its discretion request) and I agree that the University may deduct a sum equal to the relocation

expenses from my ongoing salary payments in accordance with a deductions schedule to be provided to me by the University at the relevant time.

I accept that the amount due to the University under the terms of this agreement represents a genuine attempt by the University to assess its loss as a result of the termination of my employment and that it takes into account the derived benefit to the University. I acknowledge that this agreement is not intended to act as a penalty on me upon the termination of my employment.

I understand that HM Revenue & Customs has set a time limit on relocation. Relocation must be completed before the end of the tax year (5 April) after the one in which I take up my new position.

Name: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

**\*NOTE** - no spend must be committed to until this form has been signed, returned to, and acknowledged by, the Human Resources Directorate.

# Relocation Expenses Claim Form

Name: \_\_\_\_\_

ResID: \_\_\_\_\_

Job title: \_\_\_\_\_

School/ Directorate \_\_\_\_\_

Workorder: \_\_\_\_\_

*You can retrieve this from your Finance Business Partner*

Previous town/village of residence: \_\_\_\_\_

Town/village relocated to: \_\_\_\_\_

Date of appointment: \_\_\_\_\_ Move date: \_\_\_\_\_

*(N.B. relocation must be within one year of appointment)*

Details of expenses claimed: *(Please see Relocation Policy for details of acceptable expenses).*

*Homeowners - enter amounts spent on home sale, purchase costs, removal costs and/or temporary accommodation (the maximum reimbursement will be £8,000 incl VAT).*

*Non-homeowners - enter amounts spent on purchase costs, removal costs, costs associated with taking up a new tenancy and/or temporary accommodation (the maximum reimbursement will be £8,000 incl VAT).*

Item (receipt must be attached for each)	Date of claim	Amount	HR use only
			Approved (✓)
<b>Total:</b>			

I have read the Relocation Policy and agree to the conditions therein.

Signed (Employee): \_\_\_\_\_

Date:

Head of School/Director: \_\_\_\_\_

Date:

Authorised (HR): \_\_\_\_\_

Date:

## Appendix: Equality Impact Assessment

<b>1. What is changing and why?</b> <sup>i</sup>				
Amendments made to the relocation policy to condense it making it easier for staff to digest, and all relocations including buying or renting a property can claim back up to £8,000, this has doubled for renting which was at a £4,000 cap.				
<b>2. What do you know?</b> <sup>ii</sup>				
In the last year we've had 7 staff claim for relocation expenses and 63 people start who are grade H or above, a take up of 11%. 57% of those staff taking up the relocation expenses package have been female. There was no equality impact assessment for the previous relocation policy.				
<b>3. Assessing the impact</b>				
	<b>Could benefit</b>	<b>May adversely impact</b>	<b>What does this mean?</b> <i>Impacts identified from what you know (actual and potential)</i>	<b>What can you do?</b> <i>Actions (or why no action is possible) to advance equality of opportunity, eliminate discrimination, and foster good relations</i>
a) How could this affect different ethnicities? <i>Including Gypsy, Roma, Traveller, Showmen and Boaters, migrants, refugees and asylum seekers.</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	If eligible, the individual will benefit from the monetary reimbursement of the policy. The relocation package could assist those who currently do not have a property and helps with migration across the UK. Having said that, we need to be mindful that in light of the ethnicity pay gap, we may find less take up of the relocation package due to ineligibility on grounds of salary grade.	Other than the H grade criteria, there are no restrictions for anyone of varying ethnicities. With that said, we need to continue to improve our EDI in recruitment to do our bit to improve the ethnicity pay gap. We will look to create a supporting document for those relocating to the area that can better support them with the change and enhance the offer from a health and wellbeing stance. All employees irrespective of ethnicity are also eligible for a paid moving day when they move.
b) How could this affect cisgender and transgender men and women (including maternity/pregnancy impact), as well as non-binary people?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	If eligible, the individual will benefit from the monetary reimbursement of the policy irrespective of their gender. An employee who embarks on a period of family leave may need additional arrangements put in place to ensure they can afford repayments.	If an employee is pregnant, we will need to ensure that we send them a copy of the maternity policy and make arrangements to manage the repayments during any period of reduced pay. We will look to create a supporting document for those relocating to the area that can better

			The policy language is gender neutral to ensure we are fully inclusive.	support them with the change and enhance the offer from a health and wellbeing stance. All employees irrespective of gender are also eligible for a paid moving day when they move.
c) How could this affect disabled people or carers? <i>Including neurodiversity, invisible disabilities and mental health conditions.</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	If a member of staff has caring responsibilities or are themselves disabled, it may take more expense or time to relocate due to this and therefore may require more support to successfully relocate. It does however offer that monetary support to those with caring responsibilities or a disability so they are able to take up a position at BNU that they otherwise may not have. 18.9% of our staff on a H grade or above are part-time which we may find indirectly puts those with caring responsibilities at a disadvantage of taking up these posts and therefore make use of relocation.	We will need to make sure that any further support is identified through the inclusive recruitment process and appropriate support is given to those who require it due to a disability or caring responsibility. We also may need to consider offering more part-time roles at a H grade or above.
d) How could this affect people from different faith groups?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	If eligible, the individual will benefit from the monetary reimbursement of the policy irrespective of faith.	We will look to create a supporting document for those relocating to the area that can better support them with the change and enhance the offer from a health and wellbeing stance. This could link in with the Multi-Faith Chaplaincy who can provide relevant information about the local area. All employees irrespective of faith are also eligible for a paid moving day when they move.
e) How could this affect people with different sexual orientations?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	If eligible, the individual will benefit from the monetary reimbursement of the policy irrespective of their sexual orientation.	We will look to create a supporting document for those relocating to the area that can better support them with the change and enhance the offer from a health and wellbeing stance. All employees irrespective of sexual orientation are

				also eligible for a paid moving day when they move.
f) How could this affect different age groups or generations?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	With the cost of living and high mortgage rates for Generation Z and Millennials, we may find less take up of relocating for a job at BNU amongst this age group because Buckinghamshire is the second most expensive county to buy/rent in the UK (CCN, 2018). Gen X are more likely to have more disposable income so may be more likely to be in a financial position to relocate for work.	We will need to ensure that our total offer is kept at a realistic amount for the area so we can attract the required talent. The relocation expense amount for renting has doubled from £4,000 to £8,000 which should go some way to encourage those from younger generations who may be renting. All employees irrespective of age are also eligible for a paid moving day when they move.
g) How could this affect those who are married or in a civil partnership?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	If a married/civil partnership couple are relocating for roles within BNU, and are both eligible, only one of them can receive relocation expenses. As they may likely have more items to move/store than a single person, they will likely acquire more relocation costs which may or may not be fully covered by the £8,000.	This would only have an effect if both were on a H grade or above. However as only one household would be moving then they may financially gain from both being able to claim expenses. All employees irrespective of marital status are also eligible for a paid moving day when they move.
h) How could this affect people from different backgrounds such as: socio-economic disadvantage, homeless, alcohol and/or substance misuse, people experiencing domestic and/or sexual violence, ex-armed forces, looked after children and care leavers.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	It may be likely that those from a socioeconomic disadvantage who are unable to afford a mortgage and are renting will incur less moving costs and would therefore not utilise the same reimbursement as someone who can afford a mortgage or own a home. We must also consider the isolation impact on someone relocating who is in situation of domestic violence.	Although those from a socioeconomic disadvantage may claim, we have however doubled the renting relocation expenses to match the buying/selling in this revised policy. Our Health & Wellbeing offer is widely advertised to new staff during onboarding where we offer a range of help and support. All employees are also eligible for a paid moving day when they move.
i) How could this affect people with multiple intersectional experiences? <sup>iii</sup>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	If eligible, the individual will benefit from the monetary reimbursement of the policy irrespective of their intersectional experiences.	Continue to promote EDI in our recruitment processes and training to avoid discrimination at recruitment level. We will look to create a supporting document for those relocating to the

				area that can better support them with the change and enhance the offer from a health and wellbeing stance. All employees are also eligible for a paid moving day when they move.
<b>4. Overall outcome</b>				
No major change needed <input checked="" type="checkbox"/>	Adjust approach <input type="checkbox"/>	Adverse impact but continue <input type="checkbox"/>	Stop and remove <input type="checkbox"/>	
<b>5. Details of further actions needed<sup>iv</sup></b>				
Approval from POG, LJC and UET on policy change. Create a supporting document that can help those relocating to know more about the local area and where they can find local support as they relocate. Also sign post line managers to tools where they can find documents to support their employees. A document can be created to give information about the local area that they are moving to. We are also looking at bringing in an organisation who will hold webinars and offer a free advice service on Mortgage advice and education.				
<b>6. Arrangements for delivery and future monitoring<sup>v</sup></b>				
The new policy will be uploaded onto BEN so it is available for all employees to see, when new employees are eligible for relocation this will be sent to them with their new starter paperwork.				
<b>7. Completed by:</b>	Katherine Barker	HR Advisor	<b>Date</b>	<b>29/11/2023</b>
<b>8. Signed off by<sup>vi</sup>:</b>	Tegan Rizzo-Naudi	Senior HR Advisor	<b>Date</b>	<b>05/12/2023</b>



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