

Relocation Policy & Procedure

Relocation Policy

1 Policy statement

- 1.1 The purpose of this policy is to support Queen Mary University of London (hereafter 'Queen Mary') to attract, recruit, develop and nurture a talented and diverse workforce.
- 1.2 The relocation policy compensates eligible new employees for expenses incurred on their relocation to work at Queen Mary. The relocation package may be offered as a contribution towards costs incurred, and is designed to be flexible, allowing those eligible to use the package in the best way to support their needs.
- 1.3 Heads of School / Institute Directors / Heads of Department should consider this policy and allocate a budget ahead of commencing a recruitment process and consider referencing the support available in recruitment adverts. This has the potential to widen the geographic pool of applicants. QM Venues can also be considered as a potential temporary arrangement for staff that need time to organise their new residence.

2 Eligibility

- 2.1 To qualify for financial support, staff must be newly appointed at Queen Mary and meet the following criteria:
 - Have been appointed on an indefinite contract of employment or a fixed term contract of employment of two years or more in duration at the time of initial appointment;
 - Be appointed to a role which is considered to be strategically important, or otherwise difficult to recruit to (for example due to requiring specialist expertise).
 - Must currently live beyond reasonable travelling distance from Queen Mary (50 miles from the Queen Mary London campus at which the position is based) and with the new home becoming their main place of residence and located within reasonable travelling distance (50 miles) of Queen Mary;
 - Agree to sign a repayment agreement form when offered the role¹.

Eligibility will be agreed by the relevant Head of Department/Director of Professional Services, with advice from their Strategic HR Business Partner. No express commitment should be made to a candidate to pay relocation expenses ahead of an agreement on eligibility between the Head of Department/Director of Professional Services, and their Strategic HR Business Partner.

Eligibility will be agreed by the relevant Head of Department/Director of Professional Services, with advice from their Strategic HR Business Partner. In line with our values, and to ensure equitable implementation of this policy, where possible, eligibility should be identified during the recruitment approval process prior to the role being advertised. This ensures eligibility is

¹ Where an employee resigns, or leaves (other than for reason of redundancy) within three years of the commencement of the initial contract then repayment conditions apply (please see appendix A)

decided based on the role and in line with the criteria above and aims to mitigate against the potential of bias in the application of this policy.

- 2.2 Staff who hold an externally funded position (for example, those funded by research grants), are not eligible for financial support under this policy. The funding body may be prepared to cover their relocation costs. In such cases, eligibility still needs to be confirmed by the relevant Head of Department/Director of Professional Services, with advice from their Strategic HR Business Partner.
- 2.3 Staff who hold positions which are partially externally funded may be eligible to receive a proportion of the available financial support. Eligibility will be confirmed by the relevant Head of Department/Director of Professional Services, with advice from their Strategic HR Business Partner.

3 Conditions

3.1 The following qualifying conditions will apply:

- Employment must have commenced before any claim is paid.
- Claims should be made within twelve months of the employee's contractual start date. This may be extended in exceptional circumstances and only with the approval of the Vice-Principal and the Chief Operating Officer/Director of Human Resources. However, the maximum time limit for claims to be submitted must be in line with HMRC rules for exemption of tax and NI liability. This is before the end of the tax year following that in which the employee takes up the new appointment.
- Only one relocation claim is permitted per household, e.g., if partners at the same address are both to be employed at the University, only one employee can receive an offer or make a claim for reimbursement from the University.
- Eligible employees will be offered, in writing, a relocation package under the terms of this policy and will be asked to sign to confirm their acceptance of these terms.
- Claims must be supported by documentary evidence of incurred relocation costs e.g., validated receipts or invoices. Claims submitted without relevant documentary evidence will not be processed and payment will not be reimbursed.
- Relocation costs and any removal expenses being claimed must fall within HMRC guidelines or relevant legislation at the time of the claim and will be processed in line with Queen Mary financial protocols.

4 Financial support for relocation

- 4.1 Queen Mary will provide a financial contribution towards the costs of relocation to eligible employees up to a maximum of £8,000 within the allowable expenses detailed in paragraph 5 below and where they are supported by valid receipts.
- 4.2 Relocation expenses will only benefit from tax exemption if the employee changes their main residence. Therefore, with regard to a sale that falls through, the expense of the sale will only qualify for exemption if the employee still changes their residence.

5 Allowable expenses

3.1 **Queen Mary will only pay relocation costs as defined under HMRC guidelines, within the above limits, for the categories of expenses below:**

3.1.1 Cost of disposing of your existing home (or of a proposed disposal which falls through) such as:

- Legal fees and services;
- Estate agent's and auctioneer's fees and services;
- Advertising;
- Disconnecting gas, electricity, water and telephone services;
- Legal expenses and services connected with the redemption of a loan relating to the property; and
- Rent, insurance, maintenance and security once the property was left empty, awaiting disposal.

3.1.2 Costs of acquiring a new home (or of a proposed acquisition which falls through for reasons outside of your control, or where you have good reason to pull out) including:

- Legal fees and services;
- Loan arrangements and mortgage indemnity premiums;
- Structural surveys and valuations;
- Stamp duty and land registry fees; and
- Connection fees for gas, electricity, water and telephone supplies.

3.1.3 *Costs of moving household furniture and effects such as: -

- Packing and unpacking;
- Temporary storage, if you do not move directly from the old residence to the new (up to a maximum of 3 months);
- Insurance specially taken out to cover goods in transit or in temporary storage;
- Removing and refitting domestic goods; and
- Reasonable costs of replacing domestic goods such as carpets, curtains and cookers because the goods used in your old home are unsuitable for installation in your new home.

*Before storage and/or removal of furniture are agreed, three written official quotes must be obtained. Reimbursement will usually be limited to the lowest quote. All quotes should be submitted as part of the relocation claim. Should the member of staff wish to pay extra for a more expensive quote this is at their own discretion.

3.1.4 Travel and subsistence costs for:

- One family visit to the new location in advance of the house move;
- Family travel* when the actual house move takes place from UK or overseas;
- Travel* between the old home and the temporary accommodation.

*Queen Mary will only reimburse economy class travel. Staff should ensure that all travel and subsistence costs are reasonable and not excessive. Reimbursement will usually be for the most economical mode of travel and subsistence.

3.2 Temporary Accommodation

3.2.1 If new accommodation cannot immediately be secured then temporary accommodation costs will be paid up to maximum of six months. The costs of the temporary accommodation will be met from the overall contribution sum agreed for the relocation package and will not exceed the maximum amount available for relocation under Section 4 above. A copy of the rental agreement must be included in the documentation provided as part of the relocation claim.

3.3 The following expenses cannot be claimed under this Policy:

- Work-related items such as removal of office and laboratory effects (This will need to be discussed with the employing department where assistance towards these costs may be reimbursed separately);
- Interest of bridging loans;
- Increase in insurance premium;
- Removal of motor vehicles, livestock or pets; and
- The costs incurred in the obtaining of passports and visas*.

*Certain costs for employees sponsored under the Skilled Worker and Global Talent visa routes of the immigration system can be claimed under the [Visa Reimbursement Scheme](#).

3.5 Relocating from overseas:

3.5.1 Employees relocating from overseas have access to this policy in accordance with same conditions of financial support and reimbursement as outlined above.

3.6 Leaving Queen Mary - Repayment agreement:

3.6.1 If an employee that has received reimbursement for relocation expenses resigns, or leaves (other than for reason of redundancy) within two years of the commencement of the initial contract then repayment conditions apply (please see appendix A).

For the avoidance of doubt, if an employee is appointed on a two-year fixed term contract and the contract isn't renewed after two years, then the employee would not be liable to repay the relocation expenses, unless they have resigned or otherwise leave the University's employment ahead of the fixed term contract ending.

3.6.2 Repayment of relocation costs/expenses reimbursed to staff under the circumstances described above, is contractually binding and Queen Mary will take the relevant steps (including legal recourse, where applicable) to recover such monies.

3.7 Tax Implications

- 3.7.1 £8,000 of qualifying removal expenses and benefits are exempt from tax and National Insurance Contributions as defined under the **HMRC guidelines**. £8,000 is the maximum available contribution under this Policy.
- 3.7.2 Queen Mary will process relocation costs and expenses in line with HMRC guidelines and reserves the right to reject any claim that is not permissible under the University and HMRC guidance.

4 Making a claim

- 4.1 Eligibility for relocation expenses must be agreed in advance by the Head of Department, with advice from the Strategic HR Business Partner (please refer to Section 3 above).
- 4.2 Once the Repayment Agreement has been agreed and signed by the Head of Department/Director of Professional Services and the employee, the employee must submit their claims for reimbursement using Agresso. Evidence of costs incurred (i.e. validated receipts or invoices and required quotes) must be uploaded to the Agresso system).
- 4.3 The budget holder or delegated person within the employee's School/Institute/Department, will be responsible for approving the submitted claims and must check that the claims are in line with allowable expenses outlined above and that relevant supporting documentation (including validated and written official quotes) is provided in line with this policy.
- 4.4 Once the claims are approved on Agresso by the budget holder or delegated person within the employee's School/Institute/Department, the Accounts Payable Team will conduct a scrutiny of the submitted claim to ensure it falls under allowable expenses and is in line with HMRC guidelines and before the final approval.
- 4.5 Claims for relocation costs reimbursements must be made after the employee begins employment at Queen Mary, as soon as practicable, preferably within three months of the expenditure, in the same tax year the employee commenced employment or exceptionally within twelve months of the start date of employment.
- 4.6 Payment will be made directly into the employee's bank or building society account.
- 4.7 A fraudulent claim will be treated as potential gross misconduct under the Queen Mary discipline policy and procedure. In such circumstances, they University will recover the cost of the expenses, in full, from the employee.

5. Relocation – further support and advice

5.1 Accommodation Service

- 5.1.1 Housing Services can assist with providing local expertise and guidance on private sector housing; including referrals to reputable agents and landlords, checking tenancy agreements and contracts and negotiating.
- 5.1.2 QM Venues also manage a limited number of University-owned staff flats at the Mile End Campus, which can be rented (subject to availability) for a period of up to 3 months. Further information, is available on the [Staff Accommodation](#) webpage.

5.2 **Employees moving overseas (from the UK)**

- 5.2.1 For Queen Mary employees relocating from the UK to overseas as agreed for business purposes, you should seek advice and guidance from your Strategic HR Business Partner.

5.3 **HMRC rules**

- 5.3.1 Detailed information and full HMRC rules about relocation costs and tax issues (including tax exemptions) are available on the [gov.uk website](#).

6 Equality and Diversity

At Queen Mary our mission is to be the most inclusive university of its kind anywhere. In line with our core values we seek to nurture and support talented staff regardless of their background and circumstance. We have specific KPIs focused on increasing the representation of women and Black and minority ethnic staff in senior grades across Queen Mary. Furthermore, we seek to attract the best researchers from all over the world. Our strategic ambitions must be underpinned by inclusive policies which enable us to achieve our vision. Research demonstrates that the cost and associated challenges of relocating for employment can act a barrier for particular underrepresented groups, specifically for women with caring responsibilities.

This policy seeks to remove barriers to relocation and will be applied in line with our Strategy 2030 and with our duties under the Equality Act 2010.

7 Accessibility

- 7.1 If you require any document in an alternative format, for example, in larger print, please contact your Employee Relations Adviser or Administrator.

Appendix A - Relocation costs– Repayment Agreement Form

To be offered and reimbursed for relocation expenses you are required to read, agree and sign one copy of this agreement and return it to your Head of Department or Director of Professional Services.

The Head of Department (or delegate) will acknowledge receipt of your signed form and notify the Human Resources (HR) and Finance Teams that this form has been completed and signed. HR will retain a copy of this form on your staff file.

To be completed by the School/Department/Institute:	
Employee's name	
Employee number (payroll number)	
School/Department/Institute	
Job title	
Grade	
Date relocation must be completed by	
Start date	
Domestic (within the UK)/International (please indicate clearly)	
Duration of employment	

Repayment Schedule

If you resign or leave Queen Mary (other than for reason of redundancy) within two years of the commencement of the initial contract, you will be liable to repay a proportion of your relocation expenses.

Your contractual start date is the date used to calculate the percentage of any relocation payment liable for recovery by Queen Mary.

For the avoidance of doubt, if you are appointed on a two-year fixed term contract and the contract isn't renewed after two years, then you will not be liable to repay the relocation expenses, unless you resigned or otherwise leave the University's employment ahead of the fixed term contract ending.

Duration of employment	% recovery calculation if employee leaves Queen Mary in less than three years
Six months or less	100%
More than six months but less than one year from start of employment	67%
More than one year but less than two years from start of employment	33%

Print name (Head of Department):

Signature:

Date:

Please turn over for employee signature.

I hereby accept the repayment agreement with Queen Mary University of London (Queen Mary) and agree to the recovery of the relocation expenses I have claimed for, as per the

above recovery rates should I leave my employment with Queen Mary within two years of my contractual start date. I further agree that the whole of the balance due (as per the above calculations) will be recovered, where possible, from my final salary payment; and that I will pay any further balance prior to my departure. I understand that Queen Mary has the right to take any action to recover the monies due, where applicable.

Print name (employee making claim):

Signature:

Date:

Please return this form to HR Strategic Business Partner for approval and signature:

Print name (HR):

Signature:

Date: