

Relocation Policy

Last updated: 6 June 2017 (administrative amendments only)

Policy Assigned to: Director, Human Resources

Purpose

The University aims to recruit high calibre staff from within Australia and overseas. This policy provides an overview of the relocation assistance, including reimbursement of costs, which may be offered as an incentive if required for appointees and existing staff members relocating in order to take up an appointment with the University in Australia.

This policy establishes a standard across the University and is applicable to all eligible employees.

Scope

Assistance and reimbursement of costs is available to new appointees and existing staff members who would be required to relocate from their current residence in order to accept an appointment with the University in Australia.

Casual staff members are not eligible for relocation assistance.

References

[Finance and Accounting Manual \(Travel Policy\)](#)

[University of Sydney \(Delegations of Authority - Administrative Functions\) Rule 2016](#)

[Recruitment and Selection Policy](#)

[Visa and Work Rights Policy](#)

[Living Away From Home Allowance \(LAFHA\) Guidelines](#)

[Australian Taxation Office - FBT](#)

Policy

The University may provide relocation assistance to appointees and staff members who would be required to relocate from their current residence in order to accept an appointment with the University. The parameters of the relocation assistance should be agreed by the Delegated Officer when approving the recruitment strategy for a position. The details of the relocation assistance should be agreed with the appointee or staff member, and included in the offer of employment issued by the University. For positions that are subject to external funding there may be limitations on the amount of relocation assistance available as determined by the external funding body.

Guidelines

Definitions

Appointee means a person who has received an offer of employment from the University.

Delegated Officer means the person within the Faculty, University school or Administrative Area with approval authority in accordance with the [University of Sydney \(Delegations of Authority – Administrative Functions\) Rule 2016](#).

Dependents means dependent children who are aged 18 years and under, dependent full-time students aged up to 25 years, dependents who are elderly or over 18 years of age with a disability ie. where the prospective staff member is the primary care giver and the dependents reside with the prospective staff member.

Partner means the appointee or staff member's spouse or de-facto partner.

Staff member means a person employed by the University.

Relocation Assistance

A range of items may be offered to assist in covering expenses associated with relocation and settlement of an appointee or staff member. The University's goal is to achieve full settlement at the destination location as quickly and efficiently as possible. While the total value of the assistance is determined and authorised by the Delegated Officer the appointee should have flexibility to determine the type of assistance from the options listed below that most appropriately meets their relocation needs. For positions that are subject to external funding there may be limitations or a maximum amount available for relocation assistance as determined by the external funding body.

The options for relocation assistance outlined in this policy are not to be deemed as entitlements. The University will determine what relocation assistance, if any, will be provided to an appointee or staff member.

Relocation assistance and reimbursements are not intended to cover all costs associated with relocating to a University of Sydney location. They are to assist in meeting some of the varied expenses which an appointee or staff member may incur, as outlined below in "Options for Relocation Assistance". **Note: reimbursement of expenses can be claimed against original receipts only.**

All costs associated with relocation assistance outlined in this policy are funded from the budget of the employing Faculty or Administrative Unit.

Options for Relocation Assistance

The University may provide the following as relocation assistance:

1. Travel – initial airfare or travel by train or car (may include excess baggage);
2. Visa and related costs such as health checks and/or police checks;
3. Household packaging, removal and shipment;
4. Insurance coverage;
5. Pet relocation;
6. House cleaning;
7. Storage;
8. Temporary accommodation;
9. Utility connection;
10. Settlement services; and

11. Tax services.

Details of the options that may be included as part of relocation assistance provided by the University are as follows:

1. **Travel**

1.1 Domestic Travel

Reimbursement of travel expenses within Australia, in order for an appointee or staff member to commence employment in a specified position with the University. Travel expenses for a partner and dependents and taxi fares to and from airports may be included.

The cost of travel by car may be reimbursed at the rates set out on the [Travel Services website](#).

1.2 International Travel

Reimbursement of travel expenses for an appointee or staff member located outside Australia, in order for an appointee or staff member to commence employment in a specified position with the University. Travel expenses for a partner and dependents and taxi fares to and from airports may be included.

2. **Visa, health and/or police checks**

Costs associated with obtaining a visa for all family members including visa, health checks and/or police clearance.

3. **Household packing, removal and shipment**

The payment of removal expenses can cover household packing, removal, transportation and shipment of furniture, household goods and personal effects (including professional libraries of books and papers, academic and professional equipment and the like) to the new location. Transportation of motor vehicle(s) is only applicable for domestic relocations.

4. **Insurance coverage**

The cost of insurance to cover the household packing, removal, transport and shipment and storage of household effects. It is recommended that insurance coverage is arranged as the University will not accept responsibility for any claims made or for any damage of goods.

5. **Pet relocation**

Reasonable expenses to assist in relocating domestic pet(s).

6. **House cleaning**

A one-off cost of internal cleaning of the appointee or staff member's primary residence in their place of origin after household goods removal.

7. **Storage expenses**

Storage of household effects at either or both locations, for an agreed period of time. The University will not accept responsibility for any claims for damage of goods whilst in storage.

8. **Temporary accommodation**

Temporary accommodation prior to departure in the appointee or staff member's place of origin after household goods removal from their primary place of residence.

Temporary accommodation in the host location usually in a serviced apartment or furnished accommodation following arrival. It is expected that an appointee or staff member will make arrangements for permanent accommodation whilst being accommodated in temporary accommodation.

Details of the University's preferred temporary accommodation service providers and rates can be sourced on the [Travel Services website](#). Alternatively a new appointee or staff member may source his or her own temporary accommodation.

9. Utility Connection

Utility connection fees for water, gas, electricity and telephone once the appointee or staff member has moved into his or her permanent accommodation in the host location, this does not include internet connection, aerials or service fees.

10. Settlement Services

Settlement services include:

- airport transfer/meet and greet;
- city orientation;
- home rental search;
- partner career support services;
- cross cultural briefing; and
- school search.

Where relocation assistance includes settlement services the University's preferred supplier should be utilised. An agreed settlement allowance is not available as a cash payment. The cost of these services can be obtained from the University's Immigration and Relocation team.

11. Taxation

The cost of independent taxation advice through the University's preferred supplier. It is also recommended that staff members seek independent financial advice covering their personal circumstances in relation to both home and host locations.

Exclusions

Relocation assistance offered by the University will not extend to the transportation, accommodation or storage of the following items:

- motor vehicles (international);
- articles for private enterprise or resale;
- trailers, motor vehicle spare parts and accessories;
- boats, yachts, caravans, etc.;
- wood, coal and other fuel;
- building materials;
- communication antennae (except where required to carry out assigned duties);
- farm machinery;
- horses and other livestock; or
- landscaping, gardening, lawn mowing and rubbish collection services (undertaken in either the home or host locations).

For items not included in the options or exclusions above, they will be considered on a case by case basis in consultation with the Immigration and Relocation team and be approved by the Delegated Officer.

Customs and Import Duties

The University will not provide any relocation assistance and reimburse expenses related to any form of customs import duty, agricultural and quarantine charges incurred as a result of items being brought into Australia (eg. excess alcohol). The University will reimburse expenses for customs and import that are legitimately part of the relocation (eg. pet quarantine).

Home Housing

The appointee or staff member remains entirely responsible for all housing matters in their place of origin.

The University will not provide any relocation assistance and reimburse any expenses relating to the appointee or staff members' property at their place of origin, including, but not limited to, garden or property upkeep, supervision, management fees, and insurance.

Appointees or staff members who rent any property at their place of origin while working for the University will be solely responsible for any consequences that may result. The University will not accept liability or provide any relocation assistance and reimburse any expenses incurred in respect of such property, including in situations where there is a termination of the employment contract by either party.

Other Assistance – Salary Packaging

Relocation Expenses

If relocation assistance is not offered to an appointee or staff member by the University in the appointee or staff member's offer of employment, certain relocation expenses may be salary packaged following commencement of employment using the University's salary packaging provider, so long as the staff member meets the University's eligibility criteria.

For more detail please refer to the University's [Flexible Salary Packaging Policy](#) and the [University's Salary Packaging providers' website](#).

Living Away From Home Allowance (LAFHA)

A Living Away From Home Allowance (LAFHA) is a concessional tax arrangement to compensate staff members for additional expenses and disadvantages experienced as a result of being required to live away from their usual place of residence in order to perform their duties of employment. Staff members may be eligible for LAFHA if they undertake a temporary assignment that results in them living away from their usual place of residence for a period of more than 21 days.

For more detail please refer to the University's [LAFHA Guidelines](#) and the [Salary Packaging web pages](#).

Obligation to Repay

Where a staff member's employment ends prior to the second anniversary of his or her commencement of employment, by reason of his or her resignation or termination by the University on grounds relating to performance or conduct, the staff member will be required to repay a portion of the total relocation payments made to them (or on his or her behalf) as follows:

Date of Termination	Amount to be repaid
Within 6 months of commencement	100%
Over 6 months; but less than 1 year	75%
Over 1 year; but less than 18 months	50%
Over 18 months; but less than 2 years	25%

The HR Service Centre and Immigration and Relocations team must be informed if the employment of a staff member, who has received relocation assistance, is terminated within the timeframe noted above in order that any outstanding money is paid to the University.

Procedures

Expense Reimbursement

Relocation assistance is provided as a reimbursement of expenses incurred for items specified in the appointee or staff member's offer of employment. Reimbursement will be made to the appointee or staff member upon production of original receipts. The relevant finance officer of the recruiting Faculty or Administrative Unit will assist the new appointee to obtain access to the university's expense claiming system "Spendvision". Claims for reimbursements should be made as soon as possible after the commencement of duty and finalised within the first 12 months of employment. Relocation expenses will not be reimbursed by the University if they are claimed more than 12 months from the date the expense was incurred.

Reimbursement will be in Australian dollars. If original receipts are in a foreign currency, the appointee or staff member will be reimbursed at the Australian dollar exchange rate applicable on the day the expense was incurred.

Authorisation for payment of travel and other relocation expenses must be made in accordance with the [University of Sydney \(Delegations of Authority - Administrative Functions\) Rule 2016](#).

If the appointee or staff member requires assistance in paying for services prior to commencement, an arrangement can be made for the University to pay this directly. To initiate this process the appointee or staff member should contact the Immigration and Relocations team who will assist the Faculty or Administration Unit to process such claims.

Contacts

The Immigration and Relocation team can be contacted for any queries with respect to relocation in the following ways:

Telephone: **1300 850 484 - Freecall**
+61 2 8627 1266 - Direct
Email: immigration.relocation@sydney.edu.au
Address: HR Service Centre
Level 2, 1-3 Ross Street, Glebe (K06)
The University of Sydney NSW 2006
Australia

Inquiries relating to an appointee or staff member's offer of employment should be directed to either the

Administration

1. Background

This document was created based on the review of relocation practices in 2007/2008 and Visa Guidelines 2008/2009. References to the University of Sydney (Delegations of Authority – Administrative Functions) Rule 2016 were updated in June 2017; amendments relating to organisational design changes were made in June 2017.

2. Management Responsibility

Vice-Chancellor & Principal

3. Implementation Responsibility

Director, Human Resources

4. Dates

Approval (version 1)	16/10/2009
Effect	16/10/2009
Review	
Approval (version 2)	
Effect	

5. Approval

Version 1	Dr Michael Spence
Version 2	

6. Signatures

Approved by:

Name

Dr Michael Spence

Position

Vice-Chancellor & Principal

Date

16 October 2009

Annexure A

