

Relocation Assistance Policy

This policy is being updated to reflect the new Enterprise Agreement and may currently contain out of date information. If you have any questions, please lodge an Ask HR ticket.

Section 1 - Background and Purpose

(1) The nature of the work undertaken by La Trobe University means that there may be occasions where the University requests a staff member or new hire to relocate for a limited period of time or on an ongoing basis to perform their position.

(2) The University may provide assistance to staff/new hires that are required to relocate within Australia or internationally at the University's request.

(3) The aim of the Policy is to ensure that:

- a. the process of relocating is as smooth as possible and that staff and accompanying family members settle into their new location quickly and effectively, with a minimum of disruption;
- b. costs associated with the relocation are off-set by the University in accordance with the maximum allowance rates detailed in this policy and employees are not financially disadvantaged by the relocation.

Section 2 - Scope

(4) This Policy applies to new hires and existing University staff who are requested to relocate from their primary place of residence in order to take up an academic or professional position at the University and to whom the University offers relocation assistance.

Section 3 - Policy Statement

(5) Staff or new hires moving under the University's request may be provided with some assistance towards relocation costs.

Cost Allocation - Academic & Research

(6) The total relocation assistance allowance will be split in the following manner:

- a. 100% School; or
- b. as otherwise approved by the Deputy Vice Chancellor.

Cost Allocation - Administration

(7) The total relocation assistance allowance will be split in the following manner:

- a. 100% Business Unit; or
- b. as otherwise approved by the Chief Operating Officer.

Approval Authority - Academic & Research

(8) The Deputy Vice-Chancellor (Research and Industry Engagement) and the Provost must approve the relocation assistance allowance (and repayment where required).

Approval Authority - Administration

(9) The Chief Operating Officer and the relevant Executive Director must approve the relocation assistance allowance (and repayment where required).

Eligibility

(10) At its prerogative the University may offer relocation assistance to new or existing staff who meet all of the following criteria:

- a. the appointment duration is a minimum of two years;
- b. the position is outside a 100 kilometre radius of the individual's primary place of residence;
- c. the individual is required to relocate their primary place of residence to the new location;
- d. the position is hard to fill and/or requires a particular skill set;
- e. the relevant approval authority has approved the provision of relocation assistance to the individual.

(11) The University will not offer relocation assistance to individuals who have a partner who is currently in receipt of an offer of employment with the University and that also includes provision for relocation assistance, unless the relevant school or organisational unit agree to split the relocation costs.

Assistance Offered

(12) Items outlined in this procedure are discretionary. The University is not obligated to provide relocation assistance to any individuals. Each case will be determined on its merits and the commercial value of the role.

(13) The standard terms of the relocation assistance to be provided (and the arrangements on completion or termination where relevant) will be set out in writing in an offer letter. Should these standard terms need to be varied, the relevant approval authority must authorise such changes.

(14) Relocation should not commence unless the letter of offer has been accepted.

(15) Where an individual's files and equipment are required for them to fulfil their role, the University will arrange for transportation in addition to the allowance rates detailed in this Policy.

Recovery of Relocation Assistance Payments

(16) A staff member in receipt of relocation assistance and who resigns within two years of being appointed to the relocated position or is terminated due to misconduct or serious misconduct may be required to repay all or part of the money provided by the University for relocation in accordance with the formula outlined in this Procedure.

(17) In exceptional circumstances, approval may be provided to waive the requirement to repay relocation assistance. Approval must be obtained from the relevant approval authority as detailed above.

Section 4 - Procedures

Preamble

(18) The University may request a staff member or new hire to relocate for a limited period of time or on an ongoing basis to perform a position.

(19) The University may provide assistance to staff or to new hires that are required to relocate within Australia or internationally at the University's request.

(20) The aim of the Procedure is to:

- a. provide supporting information to the policy;
- b. detail the process of approval, cost allocation, incurring and reimbursement of expenses.

General

(21) Items outlined in this procedure are discretionary. The University is not obligated to provide relocation assistance to any individuals. Each case will also be determined on its merits and the commercial value of the role.

(22) Cost allocation and approval authorities are detailed in the policy.

Allowance Rates

Domestic Relocation Assistance - Maximum Allowance Rates

| | |
|-------------------------|-------------------------|
| Single Person | AUD \$7,000 |
| Single Person + Partner | AUD \$9,000 |
| Dependents | AUD \$500 per dependent |

International Relocation Assistance - Maximum Allowance Rates

| | |
|-------------------------|-------------------------|
| Single Person | AUD \$15,000 |
| Single Person + Partner | AUD \$17,000 |
| Dependents | AUD \$700 per dependent |

(23) The allowances are maximum amounts and are determined on an individual basis by the relevant approval authority.

(24) Should a variation exceeding the below allowance rates be required, the variation must be agreed to by exception by the relevant approval authority.

(25) The allowance is paid as reimbursement for specific costs and the unused portions is not available as a cash payment.

(26) Allowance rates may be varied by the relevant approval authority as detailed in the Policy.

Files/Equipment

(27) Where an individuals' files and equipment are required for them to fulfil their role, the University will arrange for transportation in addition to the allowance rates detailed in this Policy.

Allowance

(28) The amount and level of assistance offered is at the prerogative of the University.

(29) The allowance may include, but is not limited to, the following types of relocation assistance as part of the above allowance:

a. Travel Expenses

- i. Costs associated with the staff/new hire and their direct dependents (refer definition) travelling from the existing location to the new location. This may include, but is not limited to, flights and train travel;
- ii. These expenses are expected to comply with the University's travel related policies and procedures.

b. Relocation Expenses

- i. Costs that will be reimbursed by the University to the agreed maximum level, upon presentation of tax invoices within 12 months of appointment;

ii. Reimbursable relocation expenses may include any of the following:

- temporary accommodation for up to 4 weeks for the staff/new hire and their direct dependents at an appropriate residence or on campus through Residential Services, following arrival at the new location;
- removal of furniture and personal effects from the staff/new hire's primary place of residence to the new location;
- storage of personal effects;
- visa application costs;
- insurances relating to the relocation of furniture and personal effects;
- settlement & orientation services;
- support for initial work visa application;
- for international transferees only, a consultation session with a tax agent to assist with information on Australian taxation and superannuation;
- utility connection/disconnection at permanent residence (excludes internet connection/mobile phones or service).

c. Incidental Expenses

- i. Incidental expenses may include items such as cleaning costs, utility connections, meals during transit.

d. Settlement and Orientation Services

- i. The University may provide the following settlement and orientation services through a nominated preferred service provider as part of the relocation assistance. This service may incorporate:

- meet and greet at the airport and transport to accommodation;
- destination information pack;
- orientation tour;
- partner career support;
- cross-cultural briefing;
- home search, including assistance with rental applications and utility connections;
- school search, including information packs and visits.

(30) All staff/new hires are not to commence in the relocated position unless they have obtained and provided proof of work rights as outlined in the [Recruitment Policy](#).

Relocation Agency Assistance

(31) The services of a specialist relocation agency may be provided for international relocations to assist the staff member (and their partner) in settlement and orientation in Australia. Services provided may include (but are not limited to):

- a. meet and greet at the airport and transport to accommodation;
- b. destination information pack;
- c. orientation tour;
- d. partner career support;
- e. cross-cultural briefing;
- f. home search, including assistance with rental applications and utility connections;
- g. school search, including information packs and visits;
- h. consultation with an independent tax advisor regarding Australian taxation and superannuation arrangements.

(32) The choice of relocation agency and cost of this service is to be met by the University and is in addition to the allowance rates detailed in this procedure.

Reimbursement

(33) Reimbursement will be in Australian dollars. If original receipts are in a foreign currency, the new hire or staff will be reimbursed at the Australian dollar exchange rate at the applicable time when the reimbursement is made.

(34) Claims for reimbursement will only be paid when accompanied by a valid tax receipt.

Process for Claiming Reimbursement

(35) Staff may submit their claims for reimbursement via the on line staff program or

(36) Staff not registered in the P&C system will need to submit a payment request form to the relevant approval authority. Once approval for reimbursement is obtained, the form and the receipts are to be forwarded to Accounts Payable.

Staff/New Hire Relocations

(37) Where more than one person within a family unit is employed by the University and the family relocates at the request of the University, the family must submit a single claim for reimbursement of joint relocation expenses. The relocation costs may be split equally across the relevant school or department cost centres where there is prior agreement to share the costs – refer to Eligibility in the Policy.

Recovery of Relocation Assistance Payments

(38) A staff member who has been provided relocation assistance by the University and who resigns within two years of being appointed to the position or is terminated due to misconduct or serious misconduct may be required to repay a portion of the relocation assistance allowance in accordance with the following formula:

| Period Worked | Amount to Repay |
|-----------------|--|
| Up to 12 months | 75% of total relocation assistance allowance |
| 12 to 18 months | 50% of total relocation assistance allowance |
| 18 to 24 months | 25% of total relocation assistance allowance |

| Period Worked | Amount to Repay |
|------------------------|-----------------|
| Greater than 24 months | N/A |

(39) In exceptional circumstances, the relevant approval authority as detailed in the Policy may approve the requirement to repay relocation assistance payments.

Process

(40) The following process should be followed in managing relocations:

- a. recruitment requisition completed/approved;
- b. discuss budget allowance for relocation assistance with the relevant approval authority (this may occur as the first step);
- c. identify candidate (this may have occurred earlier);
- d. tailor assistance package to candidate;
- e. offer of employment/relocation;
- f. receipt of acceptance of offer;
- g. initiate relocation.

Approval for Relocation Assistance

(41) Where relocation assistance is 'ticked' in the recruitment requisition, the relevant approvals will be obtained via the automatic routing of this requisition however managers should discuss this requirement prior to completing the recruitment requisition.

(42) Should the decision to seek candidates requiring relocation occur at a later stage of the recruitment process, the relevant approvals are required before the relocation process can commence or offered to candidates.

Discussing Relocation Assistance with New Hire/Staff

(43) Prior to formalising an offer of employment, the Recruitment Consultant must outline all the proposed details of the relocation assistance entitlement to the staff/new hire.

Offer of Employment

(44) The offer of employment will contain the terms and conditions of the relocation assistance provided.

Roles and Responsibilities

Recruitment, Selection & Appointment

(45) The Recruitment Consultant is responsible for:

- a. providing managers with information on the Relocation Assistance Policy & Procedure which details the terms and conditions available for relocating staff/new hires;
- b. ensuring the new hire/staff has agreed in writing to the terms and conditions associated with the relocation.

Managers

(46) Are responsible for:

- a. following the conditions and process that applies to relocation;

- b. assessing the relocation assistance to be provided;
- c. ensuring the new hire/staff has agreed in writing to the terms and conditions associated with the relocation.

New Hires/Staff

(47) Are responsible for:

- a. understanding the nature of the relocation and the impact on their personal circumstances;
- b. agreeing in writing to the terms/conditions associated with the relocation.

Section 5 - Definitions

(48) For the purpose of this Policy and Procedure:

- a. direct dependents: include the staff member/new hire's partner, and child/ren under the age of 18 years or a student under the age of 25 who is studying full time at school, college or university or any other person approved by La Trobe who lives with and who is fully or substantially dependent on the new hire/staff.
- b. incidental expense: means an occasional or minor expense.
- c. Primary place of residence: is the residence the individual lives in (with their personal belongings) on a daily basis.
- d. net of tax: means after taxes are taken out.
- e. New hire: is the individual who has received an offer of appointment from the University and is not currently employed with the University.

Status and Details

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| Effective Date | 11th November 2016 |
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