Relocation Assistance Policy

Section 1 - Definitions

(1) For the purpose of this Policy:

a. 'Partner' refers to the new appointee or existing employee's spouse, defacto partner or same sex partner.
b. 'Accompanied new appointee' refers to an eligible new appointee who will be relocating with their partner and/or dependents.
c. 'Dependents' refer to:
    i. Children of the new appointee or existing employee and/or their partner who are 18 years or under and reside with the appointee or employee;
    ii. Children of the new appointee or existing employee and/or their partner who are over the age of 18, are full-time students and reside with the appointee or employee; and
    iii. Elderly or disabled family members who reside with the appointee or employee and the appointee or employee is their primary carer.

Section 2 - Policy Statement

Part A - Policy Declaration

(2) This policy specifies the relocation assistance the University provides to new appointees who relocate to commence their appointments and existing employees who relocate to work at another University locality.

Part B - Policy Description

Objectives

(3) This policy aims to provide assistance to new appointees and existing employees to help with the expense of relocating to another locality.

Scope

(4) The assistance offered in this policy is available to:

a. New appointees with appointments of 50% or more for a period of at least two years, with the following exclusions:
    i. Normally, new professional appointees below the level of HEW 5 are recruited locally and the provisions of this policy would not apply;
    ii. Appointments funded by external grants unless the granting body makes funds available for this purpose; and
    iii. Senior management appointees. Assistance is provided on a case by case basis, as approved by the relevant Executive Member and supported by original receipts and appropriate documentation.

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b. Existing eligible employees who have appointments of 50% or more and are relocating from their existing workplace to work at another locality for a period of at least two years.

Section 3 - Content and Implementation

Part C - New Appointees

Types of Assistance

Travel Assistance

(5) Travel by private vehicle:

a. when travelling to their new location by private vehicle, new appointees are required to provide original receipts for the following out-of-pocket expenses:
    i. fuel costs; and
    ii. reasonable accommodation and breakfast costs where an overnight stay is warranted during the journey.
b. Reimbursement in accordance with clause (5)a, up to a maximum equivalent to the cost of economy airfares, will be arranged when receipts are provided.

(6) Air Travel:

a. new appointees (regardless of whether their relocation is from overseas or within Australia) are required to organise their own travel and, if appropriate, that of their partner and accompanying dependents, to the new location by the most direct route. Reimbursement, up to a maximum equivalent to the cost of economy airfares, will be arranged when tickets or original receipts are provided.

Removal of Furniture and Personal Effects

(7) New appointees are required to secure at least two quotes for the removal of their furniture and personal effects and, given that the University is only providing a contribution towards these expenses, they are encouraged to accept the lowest quote.

(8) New appointees are responsible for making all removal arrangements with a recognised removalist of their choice.

(9) Upon production of original receipts, the University will provide the following contribution towards the total cost of removal, including transit insurance and storage. The assistance provided does not attempt to cover the total direct or indirect costs associated with the removal. The rates shown are effective from 1 August 2024.

Location	Unaccompanied New Appointee	Accompanied New Appointee
(A) New South Wales, Australian Capital Territory, Victoria, & Queensland	$4,428	$6,481
(B) South Australia, Western Australia, Northern Territory and Tasmania	$6,165	$9,168
(C) Overseas Countries	$7,584	$11,649

(10) The assistance available in clause (9) will be increased on 1st August each year to reflect annual consumer price index (CPI) increases.

(11) The University will not accept liability for any damage or loss incurred during the transit of furniture and personal

effects.

(12) Only one claim for removal assistance will be accepted and the claim must be submitted within twelve months of commencing duty.

(13) In the event that two appointments are made from the one household, the level of assistance available to the members of that household will be the appropriate rate for an accompanied new appointee as specified in clauses (9) through (11).

Accommodation Assistance

a. Appointees relocating from within Australia

(14) New appointees will be paid a taxable 'Settling-In Allowance' to assist with immediate accommodation requirements regardless of whether the new appointee chooses to board, stay in Hotel/Motel accommodation, rent or purchase a dwelling when they commence their appointment.

(15) An allowance of $700 will be paid on the first pay day after commencement. Where the new appointee is accompanied by their partner and/or dependent children, an extra $100 will be paid for each additional person, up to a maximum payment of $1,000.

(16) The settling-in allowance may be considered taxable income by the Australian Taxation Office. For this reason, the new appointee should obtain their own independent taxation advice and retain all relevant receipts for submission to the Taxation Office, if required.

b. Appointees relocating from overseas

(17) Overseas appointees may elect to receive either:

a. a settling-in allowance equivalent to that paid to appointees relocating from within Australia; or
b. one week of temporary accommodation on relocation.

(18) The type of assistance required is to be advised on the Employee Relocation Assistance Agreement and the arrangements discussed with HR Services in the first instance.

Currency Conversion

(19) If currency conversion is necessary, reimbursement will be based on the rate of conversion applicable at the date the expense is incurred.

Repatriation

(20) The University does not offer repatriation assistance on cessation of employment.

Voluntary Separation within First Two Years of Service

(21) Where an employee resigns or retires within two years of commencement of employment, they will be liable to repay either all, or a portion, of the travel and removal assistance they have received. Accommodation assistance granted in accordance with this policy will not be recovered on separation.

(22) The amount of the repayment is based on the length of the employee's service with the University.

(23) The actual amount to be repaid will be determined on a case by case basis.

Part D - Relocation of Existing Employees Initiated by the University

(24) These provisions apply where:

a. the University requires an existing employee to relocate from their existing workplace to work at another SCU locality in response to changing organisational circumstances and/or to perform other duties consistent with their area of expertise or discipline;
b. a written relocation proposal has been approved by the relevant Executive Member;
c. the existing employee is transferred to a workplace that is more than 60 kilometres from their existing workplace and place of residence; and
d. there is a demonstrated need for the existing employee to change residence.

(25) The maximum amount of compensation available under this policy is $25,000.

(26) An existing employee granted assistance under these provisions is not eligible for any other financial assistance from the University.

(27) The Cost Centre in which the existing employee is located is responsible for all expenses.

Types of Assistance

(28) The University will consider claims for reimbursement from eligible existing employees up to the maximum amount of compensation available under this policy [see clause (25)], for the following expenses:

Travel Assistance

(29) Travel by private vehicle:

a. existing employees intending to use their own vehicle or another form of transport to travel to their new location will be eligible for assistance as provided in the University's Travel and Entertainment Policy. Travel details should be discussed with HR Services before the travel is undertaken.

(30) Air Travel

a. where approval has been given for an existing employee to travel by air to commence duty at their new location, payment and/or reimbursement up to a maximum equivalent to the cost of economy airfares for the existing employee, their partner and accompanying dependents will be arranged upon production of tickets/original receipts/invoices. Travel details should be discussed with HR Services before the travel is undertaken.

Removal Expenses

(31) Reasonable costs incurred in moving the existing employee and their dependants, including transit insurance for removal of furniture and personal effects. Existing employees are required to provide at least two written quotes for the removal of their furniture and personal effects and discuss their removal plans with HR Services before confirming any arrangements.

Furniture Storage

(32) Storage of furniture and personal effects while the existing employee secures a place of residence in the new locality and subsequent delivery to the existing employee's new residence. Reimbursement will be considered for a maximum storage period of six months.

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Rent

(33) Rental accommodation expenses while the existing employee is living away from their principal place of residence or waiting to secure a place of residence in the new locality. Reimbursement will be considered for up to a maximum of $300 per week for a maximum period of six months.

Incidentals allowance

(34) An allowance of up to a maximum of $5,000 to compensate the existing employee for incidental costs associated with establishing a new place of residence (e.g. rental bond, telephone, electricity and gas reconnection, mail redirection for a limited period).

Expenses for selling/purchasing a place of residence

(35) Where the existing employee's principal place of residence is sold in order to relocate for work purposes, they are eligible for reimbursement of the following expenses:

a. legal fees;
b. agent's commission;
c. stamp duty;
d. fees associated with the transfer of title;
e. expenses relating to the execution or discharge of a first mortgage; and
f. any reasonable costs, as determined by the relevant Executive Member, associated with advertising the sale of a dwelling-house.

(36) These expenses may be incurred:

a. in the sale of a place of residence:
    i. owned and occupied by them; or
    ii. which they are purchasing under a contract of sale providing for vacant possession and in which they intended to permanently reside; or
    iii. which they were constructing for their own permanent occupation on completion of construction, at the date on which it became necessary to move to the new locality.
b. in the purchase of a place of residence, or land for the purpose of erecting a house on the land, for their own permanent occupation in the new locality; or
c. in both of the above cases.

(37) Actual expenses incurred are payable, within the limits of the total assistance offered in clause (26) where the existing employee is:

a. the sole property owner; or
b. joint property owner or in common with the partner or a dependant of the existing employee, or the partner and a dependant of the existing employee.

(38) In all other cases the amount payable will be a maximum equalling the proportion of expenses for which the existing employee is responsible.

(39) Unless special approval is given by the relevant Executive Member, an existing employee is not entitled to the payment of expenses in respect of a sale, a purchase, or a sale and purchase of a dwelling house which is:

a. more than 2 years after the date the existing employee commences duty at the new location; or

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b. after the date on which the existing employee receives notification that they are being transferred back to the old workplace.

Other Costs

(40) Assistance within the limits specified in clause (26) may also be available for expenses such as:

a. school and child care bonds/fees where the existing employee forfeits all, or a portion of the bond/fee because of the relocation;
b. job search fees for an employed partner for a maximum of three months. The existing employee must use a University nominated job search firm in order to be eligible for this assistance.

(41) The existing employee should discuss the extent of support required and available with the Head of Work Unit. When requesting assistance, the existing employee should provide a submission to the relevant Executive Member setting out the details of the claim and supported by evidence in the form of letters, agreements, contracts, quotations, invoices and receipts.

(42) The relevant Executive Member will consider the application, taking into account the resources of the Work Unit.

Voluntary Separation within First Two Years of Relocation

(43) Where an existing employee has intentions to resign or retire within two years of commencing at the new location, the existing employee is required to advise the Head of Work Unit of their intentions prior to relocating.

(44) If an employee voluntarily resigns or retires within two years of commencing at the new location, the University reserves the right to recover all, or a portion, of the removal assistance provided. Recovery will be determined on a case by case basis with regard being given to individual circumstances.

Part E - Documentation Required

(45) All requests for assistance are to be supported by original documents such as agreements, contracts, quotes, invoices and receipts.

Status and Details

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Responsible Executive	Kim Franks Vice President (People and Culture)
Head of Work Unit	Kath Drew Director, Human Resources
Enquiries Contact	HR Services

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