Relocation Guidelines

July, 2015

Contents

1 Executive Summary ................................................................. 2
2 More information ......................................................................... 2
3 Eligibility .................................................................................... 2
4 Relocation Assistance ................................................................. 2
  4.1 Travel ..................................................................................... 2
  4.2 Removal .................................................................................. 2
  4.3 Insurance ............................................................................... 3
  4.4 Visas ....................................................................................... 3
  4.5 Temporary Accommodation .................................................. 4
5 Reimbursement and Documentation .............................................. 4
  5.1 Fringe Benefits Tax ................................................................ 4
  5.2 Repayment of Relocation Expenses ........................................ 4
6 Glossary ..................................................................................... 4
7 Versioning .................................................................................. 4

Responsible Officer Executive Director, Human Resources
Approved by Executive Director, Human Resources
Approved and commenced July, 2015
Review by July, 2018
Relevant Policy or Procedure the Guideline supports Recruitment and Appointment Policy
Responsible Organisational Unit Human Resources
Executive Summary

Open to Talent articulates the importance of our staff when it states ‘UTAS can only ever be as good as the people who choose to work with us’. The Relocation Guidelines support the University’s approach to recruitment and appointment to ensure that the University is well positioned to achieve its strategic and operational goals.

These guidelines outline a range of relocation options for new staff appointed to positions of greater than 12 months duration who relocate from intrastate, interstate or overseas.

More information

For further information, please contact your Human Resources Business Partner or Human Resources Advisor.

Eligibility

The University provides a range of relocation services for new staff appointed to positions of greater than 12 months duration, and who must relocate from an overseas, interstate or intrastate location.

While appointments are made on merit, relocation assistance is discretionary and a relocation package is an individual negotiation between the University and the appointee. The agreed relocation package will reflect the specific circumstances of the appointment, the position, and the new staff member. Approval of expenditure for relocation purposes is in accordance with the Delegations Manual.

Relocation Assistance

The following relocation options would normally be considered by the University as part of a relocation package for new staff:

- travel
- removal
- transit insurance
- visas
- temporary accommodation.

Travel

Travel for the appointee and any dependents may be funded by the relevant Budget Centre. Travel arrangements should be made by the University’s nominated travel agent in accordance with the University Travel Policy.

Removal

The Budget Centre will normally make a contribution to expenses incurred in the:

- packing, removal and transportation of furniture and personal effects
- storage of furniture and personal effects for up to eight weeks
- transportation of pet/s
- transportation of one car from the appointee’s place of residence (domestic relocation only).
The new staff member should obtain three written quotations from removalists. The University will usually accept expenses up to the value of the lowest quotation or as otherwise agreed, and any additional expense will be the responsibility of the new staff member.

Quarantine inspection fees, customs and excise duty on the importation of any item into Australia when relocating from overseas may also be approved for reimbursement.

The University would normally contribute to removal costs in the range of 14 cubic metres (in the case of a staff member who is single) to 30 cubic metres (in the case of a staff member with an accompanying partner and two or more dependents). In the case of appointees from overseas, the University may make a contribution to removal based on cubic metres, or the cost of a container.

These removal expenses would typically be in the order of:

<table>
<thead>
<tr>
<th>Location</th>
<th>Amount (individual)</th>
<th>Amount (family)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne</td>
<td>$2,500</td>
<td>$5,500</td>
</tr>
<tr>
<td>Sydney</td>
<td>$2,800</td>
<td>$7,000</td>
</tr>
<tr>
<td>Brisbane</td>
<td>$2,500</td>
<td>$6,000</td>
</tr>
<tr>
<td>Adelaide</td>
<td>$2,800</td>
<td>$5,500</td>
</tr>
<tr>
<td>Perth</td>
<td>$3,000</td>
<td>$7,500</td>
</tr>
<tr>
<td>New Zealand</td>
<td></td>
<td>$10,000**</td>
</tr>
<tr>
<td>Asia</td>
<td></td>
<td>$12,000**</td>
</tr>
<tr>
<td>USA, Canada, Europe &amp; UK</td>
<td></td>
<td>$15,000**</td>
</tr>
</tbody>
</table>

*based on 2014 prices for an estimate of 14cbm for a single staff member and a 20ft container for a staff member with an accompanying partner and two dependents.

**plus quarantine inspection fee and any applicable customs and excise duty

4.3 Transit Insurance

The University maintains a Marine Transit Insurance Policy covering the personal effects of relocating staff members whose effects are in transit.

Appointees must submit to the University a detailed inventory estimating the value of the effects.

Please refer to the University Insurance Guidelines for details of Marine Transit Insurance and any exclusions, including any effects in storage.

4.4 Visas

The relevant Budget Centre would normally fund costs associated with employer-sponsored visas for relocation purposes.

Human Resources can provide information and guidance to managers and appointees in regards to visas and visa processes, and will provide support to the Budget Centre with the visa application process. In some cases, including senior or more complex appointments, Human Resources and may recommend the use of a migration agent.

Costs for extensions to visas, permanent residency visas and associated medical costs paid by Budget Centres will incur Fringe Benefit Tax which should be paid by the relevant Budget Centre.
4.5 Temporary Accommodation

The University recognises that an appointee is faced with additional costs during their settling-in period. The relevant Budget Centre would normally pay the cost of temporary accommodation for an agreed period, normally between two and six weeks at University approved accommodation.

5 Reimbursement and Documentation

To minimise any financial burden on new staff, the University is able to pay suppliers and/or providers directly. Subject to the specific circumstances, this is the preferred option.

Any reimbursement required for relocation expenses incurred by the appointee will be made up to the approved amount, upon the presentation of receipts or other proof of payment. For expenses incurred in Australia, a receipt in the form of a Tax Invoice is required for all purchases/expenditure.

5.1 Fringe Benefits Tax

Relocation costs detailed in these guidelines are exempt from Fringe Benefit Tax unless specified otherwise.

Where a Budget Centre is intending to provide relocation assistance not detailed in these guidelines, confirmation should be sought from the Finance Business Partner as to whether or not such costs are exempt from Fringe Benefit Tax. Any Fringe Benefits Tax incurred is payable by the Budget Centre.

5.2 Repayment of Relocation Expenses

Appointees who receive removal and relocation assistance and terminate employment in less than three years from commencement or the full term of their contract may be required to refund a proportion of the expenses paid.

6 Glossary

<table>
<thead>
<tr>
<th>Term/Acronym</th>
<th>Definition</th>
</tr>
</thead>
</table>
| Budget Centre | College, Faculty, School, Centre, University Institute, other University Entity, Division, Section or University Business Enterprise.

7 Versioning

<table>
<thead>
<tr>
<th>Former Version</th>
<th>Current Version</th>
<th>Relocation Guidelines; Approved July, 2015; by Executive Director, Human Resources</th>
<th>Relocation Guidelines (current document); approved July 2015. Amended in December 2016 to incorporate Colleges.</th>
</tr>
</thead>
</table>