

Relocation Guideline

Section 1 - Purpose

(1) To document the University's position on the provision of Relocation Assistance to staff who are required to relocate.

(2) The topics covered in this Guideline are:

- a. eligibility
- b. employment conditions;
- c. funding;
- d. reimbursement;
- e. relocation components; and
- f. taxation.

Scope

Eligibility

(3) This Guideline is applicable to staff who are:

- a. required to relocate from their current residence (normally considered to be outside of a 100 kilometre radius) in order to accept an appointment with Macquarie University in Australia; and
- b. professional staff HEW Level 9 and above; or
- c. academic staff; or
- d. academic fellows (that is, have a fellowship).

(4) This Guideline is of particular relevance to all continuing and fixed-term appointments of two (2) years or more.

(5) Casual staff are not eligible.

Section 2 - Policy

(6) Nil.

Section 3 - Procedures

(7) Nil.

Section 4 - Guidelines

Overview

(8) Macquarie University aims to recruit high calibre staff from within Australia and overseas. To assist this aim, the University supports the relocation of staff as required. The University does not provide repatriation assistance, except where necessary for the University to meet [Department of Home Affairs](#) requirements.

(9) This Guideline and the [Relocation Schedule](#):

- a. provide an overview of Relocation Assistance;
- b. establish a standard across the University; and
- c. do not guarantee the provision of Relocation Assistance.

(10) As the employment relationship is one of commitment from both parties, Relocation Assistance is provided with the expectation of a minimum period of two (2) years' service. Resignation or termination by the University on grounds relating to performance or conduct prior to the end of this period will require the staff member to repay a pro-rata amount, outlined in the [Relocation Schedule](#).

Funding

(11) All costs associated with Relocation Assistance are funded from the budget of the employing Faculty or Office. As such, costs should be factored into the recruitment budget by the Faculty or Office responsible for the appointment.

Relocation Components

(12) The University will offer Relocation Assistance to eligible staff for the following components, as specified in the [Relocation Schedule](#). Items not included in the options or exclusions below will be considered on a case by case basis.

Removal and Delivery of Household, Personal, and Professional Effects

(13) The University reserves the right to limit removal and delivery to reasonable items and may, for example, exclude valuable collections of artwork and large instruments. The University may provide assistance for a reasonable maximum limit of 25 - 28 cubic meters (the approximate size of a shipping container).

(14) Removal and delivery does not include the unpacking of items or the cleaning of the former or new primary residence.

(15) Removal should be arranged through the University's preferred suppliers (see Human Resources). Two (2) maximum quote amounts – specifying cost of insurance and rate of storage, if necessary – are required. If using the University's preferred supplier, this will be arranged by the supplier. If staff wish to use another supplier, this is to be arranged by the staff member. The lower of the two (2) quotes will be accepted.

Storage Expenses

(16) Storage of Household and Personal Effects, and Professional Effects at either or both locations may be arranged for an agreed period of time. The University may provide assistance for a reasonable maximum limit of 25 - 28 cubic meters (the approximate size of a shipping container) and for a reasonable period of time (equivalent to the timeframes for temporary Accommodation detailed in the [Relocation Schedule](#)).

(17) The University will not accept responsibility for any claims for damage of goods whilst in storage.

Insurance

(18) Standard insurance may be included for the removal, storage, and delivery of Household and Personal Effects, and Professional Effects. Additional insurance or services will be at the staff member's expense. The University will not accept responsibility for any claims made or for any damage of goods.

Travel (Airlines, Train, or Car)

(19) One-way airfare or train fare may be provided for each Family member relocating, in accordance with the [Relocation Schedule](#). Airfares will be purchased by the University on behalf of the staff member and Family members.

(20) Staff members are not permitted to buy airfares and then seek reimbursement.

(21) If a Family member is relocating via motor vehicle, reimbursement upon receipt may be provided for petrol and stop-over Accommodation, if required.

Customs and Import Duties

(22) For staff relocating internationally, the University will not provide any Relocation Assistance or reimburse expenses related to any form of non-standard customs import duty, agricultural or quarantine charges incurred as a result of items being brought into Australia. The University may reimburse standard customs and import expenses for standard Household Effects, excluding artworks and collectables.

Temporary Accommodation

(23) Through the University's preferred suppliers, Accommodation may be provided for all Family members for a short period of time in the host location. Accommodation will be purchased by the University on behalf of the staff member and Family members. Any extensions to the initial period of time will be at the staff member's own expense.

Settlement Services

(24) Settlement services provided by a relocation agent may only be provided for senior executive staff relocating from overseas, as per the [Relocation Schedule](#).

Maximum Costs of All Expenses

(25) In recognition of the complexity that often surrounds relocation, the [Relocation Schedule](#) also specifies a recommended maximum dollar amount of assistance that the University will offer. In exceptional circumstances, a recommendation including the rationale can be made to the appropriate Executive Dean or Deputy Vice-Chancellor to approve payment of 10% or more above the specified maximum cost.

(26) The Faculty / Office may offer a reduced amount of assistance if the relocation costs of an appointee are less due to their individual circumstances.

Termination and Repayment Obligations

(27) Where a staff member's employment ends within the first two (2) years of service, by reason of his or her resignation or termination by the University for reason of performance or conduct, the staff member will be required to repay a portion of the total relocation payments, as follows:

Date of Termination	Amount to be repaid
Within six (6) months of commencement	100%
Over six (6) months but less than one (1) year	75%

Date of Termination	Amount to be repaid
Over one (1) year but less than eighteen (18) months	50%
Over eighteen (18) months but less than two (2) years	25%

(28) Repayment is not required in the case of redundancy.

(29) Faculty Human Resources Managers must be informed if the employment of a staff member, who has received Relocation Assistance, is terminated within two (2) years. The Faculty Human Resources Manager will liaise with Human Resources to ensure that the University is paid any outstanding money.

Employment Conditions

(30) All Relocation Assistance offered by the University will be detailed in the Letter of Offer and will supersede any prior understanding, agreement, condition, warranty, indemnity, or representation imposed, given, or made by any party.

(31) Where appointments are funded through External Fellowships, Relocation Assistance will only be available if the granting body makes funds available for this purpose.

Reimbursement

(32) Staff can only claim reimbursement of expenses with original receipts. The appointee will have six (6) months from the date of appointment to claim for relocation expenses.

Taxation

(33) The University's contribution towards an appointee's establishment expenses may be considered by the Australian Taxation Office to be taxable income. All contributions will be taxed as per Australian Tax Office provisions applicable at the time. To avoid complications, claims under this Guideline must be completed within six (6) months of the relocation.

(34) General relocation expenses are exempt for Fringe Benefit Tax (FBT) purposes under section "58F FBTA 1986". The University will not provide direct money payments to incumbents, as such payments will attract FBT. Receipts for reimbursed expenses will be kept by the University. Receipts for expenses not reimbursed should be kept by the appointee, to be submitted to the Australian Taxation Office if required.

Section 5 - Definitions

(35) The following definitions apply for the purpose of this Guideline:

- a. Family means the employee's spouse / partner (inclusive of same sex relationship) and all of their dependent children.
- b. Relocation Assistance is intended to be a reasonable contribution towards the total cost of removal, storage, and other costs associated with a relocation of a staff member to Sydney from within Australia or overseas. The amount paid does not attempt to cover all direct or indirect costs of the relocation.
- c. Household and Personal Effects includes possessions of each Family member relocating from the staff member's primary residence, excluding all motorised vehicles and any animals.
- d. Professional Effects includes the contents of one professional office per employee.
- e. Accommodation covers the "room rate" only. Any additional expenses incurred (for example food, phone, extra

beds, cots, etc) are to be met by the staff member.

Status and Details

Status	Current
Effective Date	22nd February 2021
Review Date	1st June 2022
Approval Authority	Vice-President, People and Services
Approval Date	1st February 2011
Expiry Date	Not Applicable
Responsible Executive	Eric Knight Deputy Vice-Chancellor (People and Operations)
Responsible Officer	David Ward Chief People Officer
Enquiries Contact	David Ward Chief People Officer