

# RELOCATION ASSISTANCE FOR NEW APPOINTEES PROCEDURE

## SCOPE

This procedure applies to new appointments who meet the following criteria:

- a continuing or fixed term academic appointment of two or more years; or
- a fixed-term professional appointment of two or more years at HEW level 10 or above;

**AND**

- is required to relocate more than 100 kilometres from their current residence to accept an appointment at one of the Monash University's Australian campuses.

The above eligible individuals are herein collectively referred to as 'you' for the purpose of this procedure.

Casuals, sessionals, adjuncts and honorary appointees are not eligible for relocation assistance under this procedure.

## PROCEDURE STATEMENT

Monash University ('us', 'our' or 'we') is committed to attracting the best talented academic and professional staff to fulfil the major goals outlined in our strategic plan, [Focus Monash](#). This procedure outlines the relocation assistance available to eligible staff relocating to take up an appointment with Monash University. It should be read in conjunction with the relevant [Recruitment and Appointment procedure](#).

### 1. Relocation assistance

1.1 Eligible staff will be provided the following relocation assistance:

- an economy class flight (and/or alternative domestic travel) to Melbourne from your usual place of residence, via a direct route where possible; and
- sponsorship of an application for a valid visa (including any relevant costs), where required.

1.2 Subject to the availability of funding, and the prior approval of the relevant Head of School or Department, the work unit may in certain circumstances offer you an additional relocation support package up to a maximum value as determined by the University and detailed in the special conditions of your contract of employment.

1.3 Unused portions of a relocation package cannot be cashed out.

1.4 The relocation support package is only available for relocation expenses and services that are exempt from fringe benefits tax (FBT).

1.5 The relocation support package may be used to cover the costs of the following relocation expenses (but are not limited to):

- visa sponsorship and relevant costs for family members accompanying the appointee;
- economy class flights to Melbourne (and/or alternative domestic travel) for accompanying family members, from your usual place of residence (provided the family members precede or follow you within 12 months);
- temporary accommodation on your arrival in Melbourne;
- removal costs and storage expenses;
- home search programs;
- school search programs; or
- local orientation programs.

1.6 You are encouraged to utilise the services of the University approved relocation suppliers to assist in the relocation process.

1.7 We will not directly pay for, or reimburse, any relocation expenses that attract FBT. Examples of expenses that attract FBT include (but are not limited to):

- car hire or lease costs;
- long term or permanent accommodation; and
- the purchase of furniture or homewares.

1.8 The Monash HR, Global Mobility Team is responsible for managing all approved relocation assistance, in consultation with you.

## 2. Process for relocation assistance

2.1 Monash HR, Recruitment forwards the Global Mobility Initiation form to the Head of the School or Department for completion.

2.2 The Head of the School or Department approves the relocation assistance and returns the form to Monash HR, Recruitment via [hr-recsupport@monash.edu](mailto:hr-recsupport@monash.edu)

2.3 Monash HR, Recruitment prepares and issues the employment contract detailing the agreed relocation assistance (including the value of any additional relocation support package).

2.4 Upon receipt of your accepted contract, Monash HR, Global Mobility will initiate the relocation assistance activities by engaging with preferred relocation suppliers to arrange relocation quotes and approvals in line with the relocation support set out in your employment contract.

## 3. General relocation information

3.1 In the event that the quoted relocation costs exceed the agreed relocation assistance, Monash HR, Global Mobility will consult you about any potential expenses that you may be personally liable for.

3.2 The approved supplier will coordinate the provision of all relocation benefits, in consultation with you.

3.3 The approved supplier will provide copies of invoices to you (where applicable) and to Monash HR, Global Mobility for payment.

3.4 If you specifically request a relocation provider that is not one of our approved suppliers, the request should be referred to Monash HR, Global Mobility for advice.

## 4. Leaving the University and reimbursement of relocation costs

4.1 If you resign or otherwise cease employment with us within two years of commencement, you will be required to repay a proportion of the relocation expenses incurred by us as detailed in your employment contract.

## 5. Breach of procedure

5.1 We treat any breach of our policies or procedures seriously. We encourage reporting of concerns about non-compliance and manage compliance in accordance with the applicable Enterprise Agreement or contract terms.

## DEFINITIONS

Academic staff	Individuals who are employed by the University in academic roles that are academic levels A to E, research-only staff and senior academic staff employed at the level of Dean or above.
Approved relocation suppliers (approved suppliers)	The University's approved suppliers for the provision of travel, removal and other relocation services.
Complying tax receipt	A valid tax invoice or recipient created tax invoice that contains: <ul style="list-style-type: none"><li>• the ABN of the supplier;</li><li>• the GST-inclusive price of the taxable supply;</li><li>• the words "tax invoice" stated prominently and the the date of issue of the tax invoice;</li><li>• the name of the supplier and the recipient;</li><li>• the address or the ABN of the recipient;</li><li>• a brief description of each thing supplied;</li><li>• the quantity of the goods or the extent of the services supplied; and</li><li>• when GST payable is exactly 1/11<sup>th</sup> of the total price;</li><li>• a statement along the lines of "the total price includes GST"; or the GST amount.</li><li>• For suppliers less than \$1000, the following items will not be required: and</li><li>• the quantity of the goods to the extent of services supplied.</li></ul>

Dean or Executive Director	The Dean of the faculty or Executive Director of a division or nominee in any case where the Dean or Executive Director has formally nominated a person to act as their nominee for the purpose.
Employment contract	The purposes of this procedure, is the letter of offer that is prepared by Monash HR and states the details of the contract of appointment e.g. role and responsibilities, expectations and the contract period.
Family members	For the purposes of this procedure, means: <ul style="list-style-type: none"> <li>the appointee's partner; and</li> <li>any natural and adopted children who normally live with the appointee as dependants, who have not reached either their nineteenth birthday, or the end of secondary schooling. (This age limit does not apply to a child who, through physical or learning difficulties, is unable to live independently).</li> </ul>
Monash HR, Global Mobility	The Centre of Expertise (CoE) in Monash HR accountable for providing assistance to staff moving between countries. Global Mobility provides comprehensive assistance relating to immigration, international taxation and expatriate remuneration.
Professional Staff	Non-academic staff employed by the University in HEW level roles (other than trades and services roles) or executive roles. Formerly known as general staff.
Relocation assistance	Assistance to meet some or all of the personal expenses incurred by an appointee in relocating to Melbourne to take up a position at the University. Examples of relocation expenses include, but are not limited to travel expenses, immigration expenses and removal and storage expenses.

## GOVERNANCE

Parent policy	<a href="#">Pay, benefits and entitlements</a>
Supporting schedules	
Associated procedures	<ul style="list-style-type: none"> <li><a href="#">Direct appointments</a></li> <li><a href="#">Employment visas</a></li> <li><a href="#">Recruitment of fixed-term and continuing staff</a></li> <li><a href="#">Reimbursements</a></li> <li><a href="#">Salaries, Allowances and Loadings</a></li> </ul>
Legislation mandating compliance	
Category	Human Resources
Approval body	Chief Human Resources Officer as delegate of the Chief Operating Officer - 25 July 2018
Endorsement body	Director, Workplace Relations - 25 July 2018
Procedure owner	Director Recruitment, Remuneration & Global Mobility
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Content enquiries	<a href="#">ask.monash</a> or phone Monash HR on (03) 990 20400