



Relocation Guidelines for the Appointee

Full Policy

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If you have any questions about your relocation, please contact:

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<http://www.otago.ac.nz/humanresources/join-otago/lifestyle-and-culture/relocation-and-settlement-support/index.html>



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INTRODUCTION

The University of Otago's Relocation Policy provides guidance on the level of contribution that the University of Otago will make to an appointee's relocation expenses, for specified appointments. While the policy seeks to contribute to the appointee's relocation expenses, it does not attempt to cover all direct or indirect costs.

The Relocation Full Policy comprises a contribution to:

- Removal of effects
- Marine and in transit Insurance and Storage
- Travel costs
- Accommodation assistance
- Immigration expenses

On behalf of the University, Crown Management Services manage and liaise directly with the appointee on all aspects of the relocation as outlined above. Crown Management Services will invoice the University directly for these expenses. The appointee is not required to make any removal arrangements themselves.

ELIGIBILITY

The University will contribute to relocation expenses for:

- Appointees who have been offered academic confirmation-path positions,
- Certain permanent general staff positions.

On a case-by-case basis, the University may provide a full policy or lump sum contribution (which may be by way of reimbursement) towards approved expenses for specified other positions.

At the discretion of the University, where appointments are made on a part-time basis, payment or reimbursement of the above mentioned expenses may be made on a pro-rata basis.

DEFINITIONS

For the purpose of the Relocation Policy, the following definitions apply:

Appointee: the person accepting the appointment

Partner: the spouse, civil union partner or de facto partner of the appointee

Dependents: children of the appointee and/or their partner who are 18 years or under and reside with the appointee

REMOVAL

The University will pay the expenses of packing, uplift, linehaul, seafreight and delivery services from origin to the destination residence of household goods and personal effects.

The University of Otago is not responsible for removal expenses in excess of the allowances defined below.

Appointees with excess to their allowance can either:

- negotiate with Crown Management Services to pay the difference
- make alternative arrangements for the disposal or transportation of household goods and personal effects in excess of the allowance.

The University encourages appointees to carefully consider the volume of their removal items.

Occasionally the appointee may require for their effects to be shifted in two parts e.g. office effects first, household effects second, or they may arrive first and then their family may follow with their household effects at a later date. This is acceptable, however the University recommends that the shipping of all effects takes place within a maximum of six months.

The following removal maximums apply:

INTERNATIONAL REMOVAL ALLOWANCES

Number of persons	Allowances
Appointee	12 cubic metres
Appointee with partner	18 cubic metres
Appointee with partner and dependents	28 cubic metres

Once the appointee has signed and returned the formal acceptance of the employment offer, Human Resources will initiate the relocation arrangements with Crown Management Services. Crown Management Services will undertake a survey of effects with the appointee, based on the allowances outlined above. Crown Management Services will obtain three quotes from three different removalists, and supply these to Human Resources for approval. While approval of the quote is at the University's discretion, the appointee should advise Crown Management Services directly if they have a preferred removalist in mind.

For international relocations, the appointee is eligible to have their household and personal effects export or internationally wrapped.

DOMESTIC REMOVAL ALLOWANCES

Number of persons	Allowances
Appointee	15 cubic metres
Appointee with partner	25 cubic metres
Appointee with partner and dependents	30 cubic metres

Once the appointee has signed and returned the formal acceptance of the employment offer, Human Resources will initiate the relocation arrangements with Crown Management Services. Crown Management Services will undertake a survey of effects with the appointee, based on the allowances outlined above. Crown Management

Services are responsible for the removal of effects for all domestic relocations, they are not required to obtain three quotes.

For domestic relocations, the appointee is not eligible to have their household and personal effects export or internationally wrapped.

INSURANCE – MARINE AND IN-TRANSIT

The University of Otago will contribute to the insurance of the appointee’s household and personal effects on a “door-to-door – professionally packed” basis. Crown Management Services will arrange this insurance on the University’s behalf, however this will not include any travel insurance.

INTERNATIONAL INSURANCE ALLOWANCES

Number of persons	Standard cover
Appointee	\$227.50 - Insurance cover up to the value of \$13,000
Appointee with partner	\$437.50 - Insurance cover up to the value of \$25,000
Appointee with partner and dependents	\$875.00 - Insurance cover up to the value of \$50,000

An excess of US\$100 will apply, which the appointee will be responsible for paying should an insurance claim be required.

DOMESTIC INSURANCE ALLOWANCES

Number of persons	Standard cover
Appointee	\$97.50 - Insurance cover up to the value of \$13,000
Appointee with partner	\$187.50 - Insurance cover up to the value of \$25,000
Appointee with partner and dependents	\$375.00 - Insurance cover up to the value of \$50,000

An excess of NZ\$175 will apply, which the appointee will be responsible for paying should an insurance claim be required.

TRAVEL INSURANCE

Appointees have access to personal travel insurance at their own costs via the University's international travel insurance benefits, this information can be viewed at: <http://www.otago.ac.nz/administration/policies/otago003226.html>. If the appointee wishes, Human Resources can arrange the travel insurance on the appointee's behalf. Upon the appointee's arrival, an invoice for the appropriate costs will be forwarded for payment. Note that the appointee's family is eligible to access the same travel insurance benefits, only if they are travelling directly with the appointee. If they arrive at a later date than the appointee, they are not eligible.

STORAGE

The University of Otago will cover the expense of storing household goods and personal effects for the first 14 days following arrival of the goods in New Zealand. The storage is arranged by Crown Management Services.

If the appointee is experiencing difficulty finding suitable housing and needs to extend their accommodation arrangements, the University of Otago may extend storage provisions for an additional 7-14 days, contributing up to 50% of the additional costs.

TRAVEL

The University of Otago will meet the actual expenses of a one-way economy airfare for the appointee and travelling family members covered under the policy. In the spirit of the University's Travel Policy, flights arranged will be the most direct and economical flights available. Flights are always booked economy class; if the appointee would like to travel business class, they will be required to fund the difference in cost.

Crown Management Services will make all flight arrangements and then invoice the University directly.

Human Resources will arrange for a representative from the appointee's department to collect them and their family from the airport. Human Resources will advise the appointee when these arrangements have been made.

INTERNATIONAL TRAVEL ARRANGEMENTS

If the appointee chooses to investigate flight options from their country of origin and is able to source cheaper flight quotes than those provided by the University's preferred travel agent, they must advise Crown Management Services. Crown Management Services will seek approval from Human Resources. If the appointee's quote is approved, the appointee is able to book the flights themselves, however they must retain the receipt in order to seek reimbursement from Crown Management Services upon arrival.

STOPOVER

For long haul flights, the University of Otago will pay the costs of one night's stopover accommodation for the appointee and their family en-route, as well as airport transfers. The University will not pay for meal, phone, internet or minibar expenses.

Crown Management Services will make all stopover arrangements on behalf of the University, unless the appointee requests to make their own arrangements. If the appointee opts to make their own stopover arrangements, they must retain the relevant receipts and submit these to Crown Management Services who will reimburse them on arrival in New Zealand on behalf of the University.

If the appointee would like to stop on the way to New Zealand for a holiday, prior approval from the University will be required. In these instances, the appointee will be responsible for paying the cost difference between the airfare arranged by the University and the stopover airfare and all personal accommodation.

DOMESTIC TRAVEL ARRANGEMENTS

The appointee can opt to either fly (on economy airfares), or drive to the relevant campus. If the appointee opts to drive, the University will reimburse up to the equivalent of an economy airfare (this includes the cost of ferry tickets). If the appointee is travelling from a location which is closer to the campus than the nearest airport, then the University will reimburse mileage at the prevailing rate as determined by the Inland Revenue Department. The appointee will be required to retain all receipts for submission to Crown Management Services.

Appointees driving long distance (more than one day's travel) are eligible for one night's stopover accommodation. If the appointee requests more than one night's accommodation en route due to special circumstances (e.g. small children), this will be deducted from the total accommodation allowance. Personal related stopovers are the responsibility of the appointee. Crown Management Services will make University-approved arrangements on behalf of the appointee.

ACCOMMODATION

The purpose of accommodation support is to cover a period of initial temporary accommodation while suitable housing is secured.

Crown Management Services will arrange the final destination accommodation on the University's behalf. When available, accommodation is always booked in a motel within walking distance to the relevant campus/city centre. The University will not cover meals, phone, internet, minibar expenses.

The University of Otago will pay for accommodation (only) expenses for the first 14 days upon arrival in New Zealand for the appointee and their family.

If the appointee experiences difficulty finding suitable housing, the University may contribute up to 50% of accommodation (only) expenses for an additional 7-14 days.

If the appointee has rental or permanent accommodation to immediately move into on arrival, the University does not contribute to any expenses.

IMMIGRATION

A New Zealand Immigration Adviser Act came into effect on 4th May 2009 and it requires anyone providing immigration advice about New Zealand to be licensed. Anyone that provides immigration advice, who is not licensed, can face penalties (prison and/or fines). The University of Otago is not licensed to provide advice.

The appointee will be required to retain receipts for the expenses outlined below, and submit these to Crown Management Services for reimbursement. The reimbursement will be paid in New Zealand dollars for the equivalent amount, conversion will be made at receipt's date exchange rate.

The University of Otago will pay one set of approved standard immigration expenses for the appointee and their family as per the following:

For those who have applied for Talent/Work Visa:

- Work permit/work visa fees
- Medical examination fees
- Police clearance fees

For those who have applied for Permanent Residency:

- Expression of Interest
- Migrant Levy (up to \$300 per person for four family members)
- Medical examination fees
- Police clearance fees
- Residence fees

Exclusions for both options as per the following:

- Passport photos
- NZQA fees (www.nzqa.govt.nz)
- Translation fees (for non English speaking countries)
- Courier fees
- Travel costs associated with obtaining required documents

If the University has paid for talent/work visa expenses, the cost of subsequent Permanent Residency is to be met by the appointee.

SETTLING IN

The University of Otago has a wide range of information about moving to New Zealand and our respective campus locations. This information is located on our Human Resources website: <http://www.otago.ac.nz/humanresources/join-otago/lifestyle-and-culture/relocation-and-settlement-support/index.html>

Human Resources will strive to assist the appointee with settling in, by providing them with tailored information on potential housing and schooling options, etc. Human Resources are available to answer any settlement support questions that the appointee may have.

Human Resources will set a time with the appointee once they have been in New Zealand for a couple of weeks, to hold a relocation debrief. This debrief will concentrate on any further settlement support required, any particular concerns with the relocation etc.

Crown Management Services also provide an in-house settlement service that the appointee can access. Costs for this service will be at the appointee's expense.

RESIGNATION – REPAYMENT OF RELOCATION EXPENSES

Where the appointee resigns within **three years** of accepting the appointment, or prior to the expiry of a shorter, fixed-term appointment, they must reimburse the University relocation-related expenses paid on their behalf on a pro-rata basis.

Upon receipt of the resignation, Human Resources will calculate the pro-rata amount (based on length of service and expenditure incurred) and generate a resignation acceptance letter, including the amount to repay.

Immigration costs shall be paid in full if an Appointee leaves the service of the University within three years of taking up appointment, or prior to the expiry of a shorter, fixed-term appointment.

All appointees will be provided with a summary of their relocation expenses, once their files have been closed.

POLICY EXCLUSIONS

The University of Otago's financial responsibility does not extend to include the transportation, accommodation, or storage of the following items:

- Articles for independent private enterprise
- Motor vehicles, trailers, motorcycles, motorscooters, spare parts and accessories
- Boats, yachts, etc.
- Wood, coal and other fuels
- Building materials
- Farm machinery
- Horses and other livestock
- Pets of any kind
- Items not essential for adequate day to day living
- Travel insurance
- Customs import duty
- Agriculture and quarantine charges
- Demurrage
- Steam-cleaning
- Storage levies
- Taxes or terminal charges
- Household cleaning services
- All landscaping, gardening, lawn mowing and rubbish collection services

OTHER NOTES

- Quotations supplied to the University for the transportation of household goods and personal effects are based upon the original inventory prepared by the removalist(s). The University will not accept charges for additional effects added to the consignment after the acceptance of a quotation.
- The University will accept no responsibility or liability for any failure to produce an Appointee's household goods and personal effects. Under no circumstances will the University be responsible for delays in transit caused by strike, labour trouble, riot, civil commotion, war, invasion, weather, Act of God, bankruptcy, or insolvency.
- University allowances and payments are only made on the basis that neither appointee's or any accompanying family member(s) are in receipt of, or entitled to any relocation allowance from any other organisation.

OUT OF POLICY REQUESTS

On a case-by-case basis, the University may consider out of Policy requests. In these instances, the appointee will contact Human Resources with their request for consideration, within 30 days of packing. Any approval will be at the discretion of the University of Otago.

FREQUENTLY ASKED QUESTIONS

All our FAQ's are available on the Human Resources website:

<http://hr-tp-prod02.registry.otago.ac.nz/selfservicev/Answers.aspx>