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		Policy/Procedure No. UNV 44.05	
SECTION UNIVERSITY POLICY	ISSUED March 15, 1990	Supersedes RELOCATION ALLOWANCE	
SUBJECT RELOCATION ALLOWANCE	EFFECTIVE March 15, 1990	Policy/Procedure No. Issued Jan. 1, 1988	
Prepared by Finance Dept.		Approved by Vice-President (Finance and Administration)	
<p>I GENERAL</p> <p>A. York University will assist certain specific categories of employee with the costs of relocation they incur by accepting employment at York. Assistance is at two levels, and is subject to the specific conditions and exclusions set out in this policy.</p> <p>II LEVELS OF ASSISTANCE</p> <p>A. For the purposes of this policy, there are two levels of assistance (Class I and Class II) with four categories of employee in Class I and three in Class II.</p> <p>1. <u>Class I</u></p> <p>a) The University will assist employees in the categories of Class I, when they have accepted employment at York, to relocate their dependants and household effects by reimbursing them for a portion of the expenses they incur, subject to the conditions and exclusions listed below.</p> <p>b) The categories of employee in Class I are:</p> <p>i) New full-time faculty members and professional librarians accepting probationary, tenured, or continuing appointments.</p> <p>ii) New full-time faculty members accepting contractually limited appointments with an initial appointment term of three years or more.</p> <p>iii) New full-time faculty members accepting contractually limited appointments with an initial appointment term of less than three years but who are bonifide visiting faculty, i.e., faculty holding appointments at another educational institution and visiting York.</p> <p>iv) New administrative staff in the Professional & Managerial classification accepting permanent or ongoing appointments or a specific appointment term of three years or more.</p>			

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2. Class II

- a) The University will reimburse employees in Class II for:
- i) The travel expenses they incur during their relocation, subject to the conditions and exclusions listed below
 - ii) Fifty percent (50%) of the shipping expenses for which employees in Class I are eligible, as specified in III, C, below, subject to the exclusions and conditions of this policy
- b) If an employee in Class II, after the completion of the required initial appointment period, accepts a position in categories (b), (i) or (iv) of Class I, he or she will be eligible for reimbursement of the remaining 50% of the initial shipping expenses.
- c) The categories of employee in Class II are:
- i) New Post-Doctoral Fellows.
 - ii) New full-time faculty members accepting contractually limited appointments with an initial appointment term of less than three years, other than visiting faculty as defined in II, A, 1, (b), (iii) above.
 - iii) New support staff included in the Professional and Managerial Group accepting appointments with a specific appointment term of less than three years.

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III. ELIGIBLE EXPENDITURES


A. TRAVEL EXPENSES

1) Transportation Expenses

- a) York University will pay the actual transportation for a new faculty or staff member and each dependant member (as defined by the Canadian Income Tax Act) of his or her immediate family, by economy air travel, first class rail, or tourist rate ocean passage, plus ground transportation to and from the terminal at each end of the route.
- b) If a private vehicle is used, the University will pay a distance allowance, at the University's prevailing rate, for the most direct route as established by van line mileage or equivalent rail mileage. If a Car-Go-Rail (or similar) plan is used, the University will pay transportation expenses as if travel had been by private vehicle.

B. MEALS AND LODGING

1. If travel is by air, rail or ocean, the University will pay for meals not included in the fare up to a maximum of \$30.00 per person per day.
2. If travel is by private vehicle, the University will pay for meals up to \$30.00 per person per day for a reasonable number of driving days. A driving day is defined as 640 KLMS.
3. If a Car-Go-Rail (or similar) plan is used, the University will, in addition to the transportation expenses in III, A, 1, (b), above, pay an amount equivalent to those expenses that would have been incurred had travel been by private vehicle. The University will allow \$30.00 per person per day for a period not exceeding three days at the beginning or end of a journey to enable the new faculty or staff member and his or her family to vacate their prior residence or seek new accommodation upon arrival.


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C. SHIPPING EXPENSES


1. The University will reimburse a new faculty or Professional and Managerial staff member for the removal of household effects (subject to the conditions and exclusions set out below) from a member's previous residence to his or her new residence in the Toronto area on the following basis:
 - The first \$1,500 will be reimbursed in full
 - Any balance over \$1,500 and up to \$5,000 will be reimbursed at a rate of 2/3 of the balance.
 - Any balance over \$5,000 will require approval by the appropriate Vice-president. The appropriate Vice-president and the Vice-president (Finance and Administration) may, in exceptional circumstances, give consideration to applications above the standard rate.

IV INELIGIBLE EXPENDITURES

- A. York University will not reimburse a new faculty or staff member for the cost of the following:
 1. Shipping an unaccompanied automobile (see at III, A, Travel Expenses, above), aircraft, boat, trailer, mobile home, snowmobile, grand piano, heavy shop equipment, recreational equipment in excess of 200 kg., plants, or frozen or perishable foods.
 2. Furniture storage or any expenses associated with moving to and from storage.
 3. Disconnection or connection of any equipment, fixtures, or appliances other than a stove, clothes washer, or clothes dryer.
 4. Cleaning services at the old or the new residence.

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<ol style="list-style-type: none"> 5. The replacement of fitted carpets or draperies. 6. Visiting the Toronto area to view housing. 7. Travel or shipping expenses if, as a result of his or her move, the distance to the University from the employee's new accommodation is greater than it was from his or her previous accommodation. 8. Travel or shipping expenses if the employee's new accommodation is less than twenty-five miles closer to the University than his or her previous accommodation. 9. Losses incurred by the sale of the employee's home or other assets. 10. Legal costs involved in the sale or purchase of a home. 11. Shipping the furnishings of a second home. 12. The enforced maintenance of two homes. 13. Excess baggage charges. 14. Expenses of servants, nurses, relatives (other than dependants as defined in the Canadian Income Tax Act), or pets. 15. Import duties. 16. Passports or visas. 17. Vaccination and medical costs associated with immigration. 18. Gratuities to movers. 			

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V CONDITIONS			
<p>A. An estimate of travel and shipping expenses must be provided, in duplicate, on an <u>Estimate of Relocation Expenses</u> form, and the employee must be recommended by the appropriate Chair or Director of the department in which he or she will be employed, and approved by the appropriate Dean or Vice-President. The approved copy is to be forwarded to the Manager, General Accounting, E.O.B..</p>			
<p>B. A claim for reimbursement must be approved by the appropriate Dean or Vice-president of the Faculty, Department or Division and forwarded to the Manager, General Accounting, E.O.B., for review, confirmation, and payment.</p>			
<p>C. All expenditures other than meals, gratuities, car mileage, and local taxis (under \$10.00), must be supported by original receipts. Shipping receipts must be itemized and include details of the items shipped.</p>			
<p>D. A faculty or staff member in Class I who elects to leave the service of York University within three years of his or her date of employment, shall normally be expected to refund York University 75% of the reimbursement for relocation expenditures if separation occurs during or at the end of the first year; 50% if separation occurs during the third year. The Faculty or Department concerned is responsible for notifying the Manager, General Accounting, in advance, when any such faculty or staff member is leaving. The Manager will then arrange for the recovery of any refund owing to the University.</p>			
<p>E. The University does not assume any liability nor will it be held responsible for any injury or loss which may arise during or as a result of an employee's relocation.</p>			

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<p>VI GENERAL</p> <p>A. Upon request, the University will issue a Purchase Order requesting the van line selected by a new faculty or staff member to bill York University directly. Advances for travel expenditures will only be issued upon the approval of the Dean or Vice-President in the Faculty or Division concerned, and must be requested when the estimate is submitted for approval. Any expense incurred by a new faculty or staff member as a result of either an advance, or moving expenses on a purchase order, that is greater than is allowed on the approved scale must be promptly reimbursed to the University upon request. Such reimbursement will be arranged by the Manager, General Accounting.</p> <p>The University encourages eligible new employees to use the facilities of the Purchasing Department, through their faculty/department, to facilitate the use of reliable and competent moving companies.</p>				