

Faculty of Arts

Administrative Policy & Procedures

Issued by: Office of the Dean

Contacts: Senior Executive Officer, Financial Officer

Effective: September 1, 2003

Subject: **Relocation Assistance for New Faculty Members**
(Combines York University Policy No. UNV 44.05, Issued March 15, 1990 and
Faculty of Arts Enhanced Policy, Issued July 1, 1997)

Preamble

The following combines the University policy on relocation, and the Faculty of Arts Enhanced policy, as stated above. This is to provide clarity in terms of the relocation allowance as well as to reflect more current rates for shipping costs.

I GENERAL

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.

II LEVELS OF ASSISTANCE

Class I

- 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.
- B. The categories of employee in Class I are:
- i. New full-time faculty members and professional librarians accepting probationary,
 - ii. tenured, or continuing appointments.

 - iii. New full-time faculty members accepting contractually limited appointments with an

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- initial appointment term of three years or more.
- iv. 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.
 - v. New administrative staff in the Confidential, Professional and Managerial classification accepting permanent or ongoing appointments for a specific appointment term of three years or more.

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, B, iii. above.
 - iii. New support staff included in the Confidential, Professional and Managerial classification, accepting appointments with a specific appointment term of less than three years.

III. ELIGIBLE EXPENDITURES

A. Travel 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

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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

- a) If travel is by air, rail or ocean, the University will pay for meals not included in the fare up to a maximum of \$43.00¹ per person, per day.
- b) If travel is by private vehicle, the University will pay for meals up to \$43.00 per person per day for a reasonable number of driving days. A driving day is defined as 640 kms.
- c) If a Car-Go-Rail (or similar) plan is issued, the University will, in addition to the transportation expenses in III, A, (b), above, pay an amount equivalent to those expenses that would have been incurred had travel been by private vehicle.

C. Seek and Vacate

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.

D. Shipping Expenses

The University will reimburse a new faculty or Confidential, 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:

- a) The first \$5,000 will be reimbursed in full.
- b) Any balance over \$5,000 and up to \$10,000 will be reimbursed at a rate of two-thirds of the balance.

¹ Based on the University Procedures for Reimbursement of Expenses, on Per Diem Allowances. Policy #033, dated June 2000.

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- c) Any balance over \$5,000 will require approval by the Vice-President, Academic. The Vice-President (Academic) and the Vice-President (Finance and Administration) may, in exceptional circumstances, give consideration to applications above the standard rate.

IV INELIGIBLE EXPENDITURES

York University will not reimburse a new faculty or staff member for the costs of the following:

1. Shipping an unaccompanied automobile, 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.
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

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- Income tax Act), or pets.
- 15. Import duties.
- 16. Passports or visas.
- 17. Vaccination and medical costs associated with immigration.
- 18. Gratuities to movers.

V CITIZENSHIP & IMMIGRATION FEES

Eligibility and Criteria

- a) This assistance is available to new tenure stream faculty members, defined as Class I employees.
- b) This covers additional costs relating to immigration service fees as levied by Citizenship and Immigration Canada based on the January 1st, 1997 Fee Schedule. Any changes to the January 1st, 1997 Fee Schedule would be subject to review before policy revision.
- c) This assistance is only available at the time of appointment and may not be applied for retroactively, if the immigration occurred before the acceptance of the offer of employment from York University.
- d) The Faculty of Arts will cover 100% of these costs for new Class I faculty members and two-thirds of these costs for spouses and dependants relocating with the faculty member.
- e) Contractually limited appointments are ineligible for this enhanced assistance due to the limited nature of their appointment.

Fee Schedule for Citizenship and Immigration Services as at January 1st, 1997 published by Citizenship and Immigration Canada

EXPLANATION OF FEE TYPES

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a) Privilege Fees

- i. Privilege fees are collected at the time an application is submitted and are payment for a specific right or privilege, such as the acquisition of permanent resident status (Right of Landing Fee). If the right or privilege is not granted, the fee must be refunded.
- ii. These fees provide partial compensation for the many intangible economic, social and legal rights and privileges that citizenship and permanent resident status confer. They are designed to increase equity in the revenue system by shifting a greater proportion of the financial responsibility from general taxpayers to the principal beneficiaries of the services.
- iii. Privilege fees are paid in addition to the processing fees for applications for permanent residence or Canadian citizenship.

b) Right of Landing Fee

The Right of Landing Fee is payable by all adult immigrants 19 years of age and over, regardless of nationality ethnic origin or immigrant class, who apply to become permanent residents of Canada.

c) Processing Fees

Processing fees are collected at the time an application is submitted and help to defray processing costs.

FEE SCHEDULE

	Schedule	Arts Portion	Applicant Portion
Right of Landing Fee			
- Applicant	\$ 975	\$ 975	\$ 0
- Spouse & Dependants over 19	\$ 975	\$ 650	\$ 325
Application for Permanent Resident			
- Applicant	\$ 500	\$ 500	\$ 0
- Spouse	\$ 500	\$ 333	\$ 167
- Dependants 19 years and over	\$ 500	\$ 333	\$ 167
- Dependants less than 19 years	\$ 100	\$ 67	\$ 33

4. Documentation and Reimbursement Handling

- a) It is the responsibility of the new faculty member to prepare and submit all required documentation for the above applications.
- b) If the employee wishes they may, by means of an Accountable Advance, arranged through the Faculty of Arts Financial Officer, for the eligible amount of the Citizenship and

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- Immigration Service Fees as covered by this policy.
- c) It is the responsibility of the faculty member to secure an official receipt for all monies paid to Citizenship and Immigration Canada.
 - d) Original receipts are to be forwarded to the Faculty of Arts Financial Officer, Pauline Marwan, S928 Ross, complete with a Claim for Reimbursement of Expenses, to clear the outstanding Accountable Advance. The faculty member shall do everything possible to complete this paperwork within six months of their employment at York University.

PROCEDURES

An estimate of travel and shipping expenses must be provided, in duplicate, on an Estimate of Relocation Expenses form, signed by the Financial Officer, and where applicable, approved by the Vice President-Academic. The approved copy is to be forwarded to the Manager, Treasury Department, E.O.B.

A claim for reimbursement of expenses must be approved by the Financial Officer, and where applicable, the Vice President-Academic and forwarded to the Manager, Treasury Department, E.O.B., for review, confirmation, and payment.

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.

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 is responsible for arranging the recovery of any refund owing to the University.

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.

There are pre-approved corporate movers established by the Faculty of Arts. If the faculty member chooses, the Financial Officer can make the necessary relocation arrangements with the moving company. A Purchase Order will be issued, and the vendor will bill York University directly.

Any shipping costs which exceed the allowance, or any ineligible expenses are to be reimbursed to the Faculty. Arrangements for repayment should be discussed with the Financial Officer once the final invoice has been received.

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Advances for travel expenditures will only be issued upon the approval of the Financial Officer. It is the responsibility of the faculty member to retain all original receipts, and complete a Claim for Reimbursement of Expenses to clear the advance on a timely basis.

It is recommended that the faculty member contact the Financial Officer, or Budget Assistant for further details. A brief appointment is usually set-up to assist with the completion of all necessary paperwork.

Contacts in the Faculty of Arts

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