

Relocation Assistance¹

Section 1: Introduction

This document outlines Atkinson Faculty of Liberal and Professional Studies procedure for relocation assistance available to new employees (academic and non-academic). This procedure combines the University policy on relocation as well as the Faculty's procedure. The intention of this relocation procedure is to provide guidelines and clarity in terms of the relocation allowance and assistance available to new appointments to the Faculty.

York University will assist certain new employees with some of the costs of relocation incurred by accepting employment at York. Relocation assistance is offered in two categories, dependant upon the position taken, and is subject to all conditions and exclusions set out in this policy.

Section 2: Levels of Assistance

In terms of the York University relocation assistance, there are two categories of new employees, identified as Class I and Class II.

A. Class I

- a) Class I category employees include:
 - i) new, full-time faculty members and professional librarians accepting probationary, tenured, or continuing appointments;
 - ii) new, full-time faculty members accepting contractually limited appointments with an initial appointment term of three years or more;
 - iii) new full-time faculty members accepting contractually limited appointments with an initial appointment term of less than three years but who are classified as visiting faculty, (i.e. faculty holding appointments at another educational institution and visiting York);
 - iv) new administrative staff who are classified as CPM, accepting permanent, ongoing appointments or a specific appointment term of three years or more.
- b) When a new employee in Class I accepts employment at York University, the University will provide assistance to relocate their dependants and household effects by reimbursing them for a portion of the expenses they incur, subject to the definitions, conditions and exclusions listed in Sections 3, 4 and 5 below.

B. Class II

- a) Class II category employees include:
 - i) new post-doctoral fellows;
 - ii) new full-time faculty members accepting contractually limited appointments with an

¹ Paraphrased from University Policy: Relocation Allowance. Policy/Procedure No. UNV 44.05, issued March 15, 1990.

- initial appointment term of less than three years, with the exception of visiting faculty who are classified as Class I, as described in Section A, a) iii, above;
- iii) new administrative staff who are classified as CPM, accepting appointments with a specific appointment term of less than three years (exceptions for short-term contracts of less than one-year may apply).
- b) The University will reimburse employees in Class II for:
- i) the travel expenses they incur during their relocation, subject to the definitions, conditions and exclusions listed in Sections 3, 4 and 5, below;
 - ii) fifty per cent (50%) of the shipping expenses for which Class I employees are eligible, as specified in Section 3, C., below, subject to the definitions, conditions and exclusions listed in Sections 3, 4 and 5, below.
- c) If, after the completion of his or her initial appointment period, an employee in Class II accepts a position described in Class I, i) or iv) above, he or she will be eligible for reimbursement of the remaining fifty per cent (50%) of his or her initial shipping expenses.

Section 3: Eligible Expenditures

A. Travel Expenses

- a) Transportation Expenses
- i) The University will pay the actual transportation costs for a new faculty or CPM staff member and each dependant member of his or her immediate family (as defined by the Canadian Income Tax Act), 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.
 - ii) 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 \$43.00² 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. Per diem lodging for travel by private vehicle is \$13.50 per day. The university does not cover hotel accommodation for travel by private vehicle.
- c) If a Car-Go-Rail (or similar) plan is used, the University will, in addition to the transportation expenses outlined in Section 3, A, ii), above, pay an amount equivalent to those expenses that would have been incurred had travel been by private vehicle.

² Based on the University Procedures for Reimbursement of Expenses, on Per Diem Allowances. Policy #033, dated June 2000. Note, per diem allowance may be claimed in lieu of actual expenses, but not in addition thereto.

C. Seek & Vacate

The University will allow a per diem amount of \$43.00 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 CPM 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 remaining over \$5,000 and up to \$10,000 will be reimbursed at a rate of $\frac{2}{3}$ of the balance.
- c) Any balance over \$5,000 will require approval by the appropriate Vice-President by request of the Dean. The appropriate Vice-President and the Vice-President (Finance and Administration) may, in exceptional circumstances, give consideration to applications above the standard rate.

Section 4: Ineligible Expenditures

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

- a) Shipping an unaccompanied automobile (See Section 3, A, above), aircraft, boat, trailer, mobile home, snowmobile, grand piano, heavy shop equipment, recreation equipment in excess of 200 kg, plants, or frozen or perishable foods.
- b) Furniture storage or any expenses associated with moving to and from storage.
- c) Disconnection or connection of any equipment, fixtures, or appliances other than a stove, clothes washer, or clothes dryer.
- d) Cleaning services at the old or the new residence.
- e) The replacement of fitted carpets or draperies.
- f) Visiting the Toronto area to view housing.
- g) 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.
- h) 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.
- i) Losses incurred by the sale of the employee's home or other assets.
- j) Legal costs involved in the sale or purchase of a home.
- k) Shipping the furnishings of a second home.
- l) The enforced maintenance of two homes.
- m) Excess baggage charges.

- n) Expenses of servants, nurses, relatives (other than dependants as defined in the Canadian Income Tax Act), or pets.
- o) Import duties.
- p) Passports or visas.
- q) Vaccination and medical costs associated with immigration.
- r) Gratuities to movers.

Section 5: Citizenship and Immigration Fees

- a) Eligibility and Criteria
 - i) This assistance is available to new tenure stream faculty members, defined as Class I employees.
 - ii) 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.
 - iii) 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.
 - iv) Atkinson Faculty 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.
 - v) Contractually limited appointments are ineligible for this enhanced assistance due to the limited nature of their appointment.
- b) **Explanation of Fee Types**
 - i) Privilege Fees
 - (1) 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.
 - (2) 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.
 - (3) Privilege fees are paid in addition to the processing fees for applications for permanent residence or Canadian Citizenship.
 - ii) Right of Landing Fee

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

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

FEE SCHEDULE

	Schedule	Atkinson 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

iv) Documentation and Reimbursement Handling

- (1) It is the responsibility of the new faculty member to prepare and submit all required documentation for the above applications.
- (2) If preferred, an employee may, by means of an Accountable Advance, arrange through the Budget Officer, Office of the Dean, Atkinson, for the eligible amount of the Citizenship and Immigration Service Fees as covered by this policy.
- (3) It is the responsibility of the faculty member to secure an official receipt for all monies paid to Citizenship and Immigration Canada.
- (4) Original receipts are to be forwarded to the Budget Officer, Office of the Dean, Atkinson, complete with a Claim for Reimbursement of Expenses, to clear the outstanding Accountable Advance. The faculty member shall do everything possible to complete the paperwork within six months of their employment at York University.

Section 6: Conditions

- a) The Budget Officer, Office of the Dean, Atkinson must be contacted to make arrangements for quotes (normally three) to be provided for shipping of household effects for new appointments (the new employee must have been recommended by the Chair or Director of the department³ in which he or she will be employed, and approved by the appropriate Dean or Vice-President). The estimates need to be arranged through and subsequently forwarded to the Budget Officer, Office of the Dean, Atkinson.
- b) Upon arrival/relocation, a claim for reimbursement for other expenses (air travel, mileage, per diem etc.) must be forwarded to the Budget Officer, Office of the Dean, Atkinson, for review and approval by the Dean and/or Vice-President.
- c) Original receipts must support all expenditures other than meals, gratuities, car mileage, and

³ In the University Policy document (UNV 44.05), the word “department” is used in a generic sense. It may refer to the Faculty, academic department or school.

local taxis (under \$10.00). Shipping receipts must be itemized and include details of the items shipped.

- 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% or 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 Office of the Dean, Atkinson, in advance, when any such faculty or staff member is leaving. The Office of the Dean will then arrange for the recovery of any refund owing to the University.
- e) The University does not assume any liability nor will it be held responsible for any injury or loss that may arise during or as a result of an employee's relocation.

Section Office of the Dean, Atkinson 7: Services Available through York University

Upon request, the University will issue a Purchase Order requesting that the van line selected by the new faculty or CPM 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 that is greater than what is allowed on the approved scale and was paid for with either an advance, or on a purchase order by the new faculty or CPM staff member must be promptly reimbursed to the University upon request. The Budget Officer, Office of the Dean, Atkinson, will arrange such reimbursement.

The University encourages eligible new employees to use the facilities of the Purchasing Department, through their Faculty or department, to facilitate the use of reliable and competent moving companies (see section 6. a).

Section 8: Atkinson Contacts

Budget Officer:	Maureen Blenkhorn	
	Phone: 416-736-2100 ext. 20480	Email: mblenk@yorku.ca
Executive Officer:	Sarah Cantrell	
	Phone: 416-736-2100 ext. 70878	Email: sthrush@yorku.ca