Procedure for Relocation and Removal

NOT IN EFFECT UNTIL JANUARY 1, 2027



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Responsible Unit: Office of the Associate Vice-President (Finance) and Chief Financial Officer

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Definitions

Excessive Weight: The weight of Normal Personal Effects over 8,000lbs for an appointee (with or without a spouse), and an additional 1,000lbs per child.

Familiarization Visit: Offered in certain situations when an accepted offer of employment is in place. The visit is intended for appointees to meet with colleagues regarding curriculum and research matters, and to become familiar with the unit they are joining.

Normal Personal Effects: Refers to normal household goods and effects such as furniture, clothing, and items of a personal nature to the maximum of 8,000lbs for an appointee (with or without a spouse), and an additional 1,000lbs per child. Personal Effects do not include motor vehicles, boats, antique collections, pets, unusually heavy hobby items and the like.

Postdoctoral Fellow: As defined in the *Postdoctoral Fellow Policy.*

Receipt: The proof of travel expense payment required to support the amount requested for reimbursement on a travel expense claim.

Relocation: Travel conducted by a newly appointed employee and the new employee's spouse/partner and dependent children to relocate to their new place of employment with the University.

Removal: The move of the newly appointed employee's Normal Personal and Scholarly Effects.

Scholarly Effects: Refers to scholarly and technical books, and technical equipment relevant to the newly appointed employee's scholarly activity

Travel Deviation: A departure from University travel policies or procedures that requires authorization by both the Unit Head and Vice-President (Finance and Administration), including deviations for expenses related to specific cultural practices or medical reasons.

Traveller: any member of the University Community making a claim under the terms of University travel policy and procedures.

Unit Head: Those holding the responsibility of a unit's budget and activities (or their delegate), with the authority to approve travel and the ability to assess that such travel is necessary, reasonable, legitimate, and appropriate.

University: Memorial University.

University Community: Comprised of all people who teach, conduct research, study, or work at or act under the auspices of the University and includes, without limitation, all employees, students and any other person(s) while they are acting on behalf of, or at the request of, the University.

Procedure

1. General

1.1. This procedure supplements the Travel Expense Management Policy and related policies and procedures and should be read together with those documents. Where a Traveller is subject to a contract or agreement that requires alternative arrangements, those arrangements will be supported during the authorization and claims process with such provisions attached.

1.2. Travellers should consult their Unit Head, unit financial administrator and / or Financial Services when clarification is required.

1.3. For any travel expense not provided for under this *Procedure,* application must be made to the Vice-President (Finance and Administration) for further authorization as a Travel Deviation if first approved by a Unit Head.

1.4. Relocation travel arrangements will be arranged and paid for by the appointee and reimbursed to the appointee after travel is completed (see *Authorizing and Arranging Relocation Travel* and *Expense Reimbursement* below).

2. Relocation and Removal Provisions

2.1. The Secretary to the Board of Regents or the Director of Human Resources or the Director of Faculty Relations will ensure that all applicable letters of appointment include provisions with respect to Relocation and Removal expenses.

2.2. Unit Heads will review University travel policies and procedures with the appointee in respect of eligible Relocation and Removal expenses included in their employment contract and/or collective agreement.

2.2.1. This procedure does not apply to relocating Postdoctoral Fellow appointees. Such appointees will follow *Procedure for Relocation of Postdoctoral Fellows*.

3. Authorizing and Arranging Relocation Travel

3.1. A copy of the appointment letter will serve as authority for the appointee to incur any agreed-upon Relocation and Removal expenses and the Department of Financial Services to charge the applicable unit's budget for authorized expenses.

3.2. The University does not issue advances to cover Relocation travel costs. If the appointee is unable to fund their travel, alternate arrangements for some types of expenses may be arranged at the discretion of the Unit Head.

3.3. Eligible Relocation expenses for reimbursement include:

a) Airfare for the appointee, their spouse/partner and any dependent children from their place of residence prior to the appointment, to their new place of employment as defined by the University.

(i) Excess baggage costs are only claimable where it can be demonstrated that this is a cost effective means of moving such baggage, and the contents are Personal or Scholarly Effects.

b) The cost of commercial or private accommodations for a maximum of seven (7) nights. The seven (7) nights is a combined maximum total of nights at the appointee's departure point and at their new place of employment as defined by the University.

(i) When staying in private accommodations (i.e. hosted by friends or family), claimable nightly rates are outlined in the *Schedule of Reimbursable Expenses*. This rate is per night, per family and not per night, per individual traveler.

(ii) At the discretion of the Unit Head, the maximum seven (7) nights described above may be combined with the maximum three (3) nights provided for in the *Procedure for Familiarization Visits* for a maximum combined total of ten (10) nights.

c) Meals will be reimbursed as per the *Schedule of Reimbursable Expenses*. For children 12 years or younger, the University will reimburse the maximum of 50 per cent of the applicable per diem rate.

d) Work visa application fees, permanent resident application fees, and permanent resident application fees for the appointee's partner/spouse and dependent children, payable to Citizenship and Immigration Canada, may be reimbursed subject to budgetary requirements and pre-approval by the Unit Head. In accordance with Canada Revenue Agency Guidelines, any amount reimbursed for immigration expenses will be considered a taxable benefit to the appointee.

3.4. When an appointee chooses to relocate by an indirect route or transportation method that extends travel time and cost, the appointee will be reimbursed for their actual cost of travel with Receipts to a maximum of the estimated cost of the most reasonable travel route by the most cost-effective means of transportation.

4. Preparing for Removal of Effects

4.1. As approved by the Unit Head, and in accordance with the various collective agreements in effect, newly appointed or transferred employees with whom the University has agreed to reimburse Removal of Normal Personal Effects shall be reimbursed for:

a) Up to 100 per cent of the cost of moving Normal Personal Effects of the appointee, their spouse/partner and dependent children as determined by the University mover. The percentage to be paid will be stated in the letter of appointment.

OR

b) Should an appointee choose not to utilize the services of the University's selected carrier, the University will reimburse the appointee by the percentage agreed to in the letter of appointment, multiplied by the actual moving costs (based on documentation supported by original Receipts) to a maximum of the percentage agreed to in the letter of appointment, multiplied by the estimated cost as determined by the University carrier (section (a) above).

4.2. In addition to the Removal of Normal Personal Effects described in section 4.1 above, 100 per cent of the cost of moving authorized Scholarly Effects shall

also be reimbursed. Scholarly Effects must be identified, itemized and estimated separately from Normal Personal Effects by the selected carrier.

4.2.1. Appointees must receive signed authorization from the Unit Head before moving any technical equipment to the University.

4.3. The cost of Excessive Weight for the Removal of Normal Personal Effects may be paid subject to budget availability and the authorization of both the Unit Head and Vice-President (Finance and Administration).

4.4. The cost to transport a personal vehicle to a maximum of $3,000, subject to the budget availability and authorization of both the Unit Head and Vice-President (Finance and Administration).

5. Arranging Removal of Effects

5.1. The appointee shall contact the Staff Accountant - Household Removal at 709-864-2597 or relocation@mun.ca (Department of Financial Services) to arrange the University appointed carrier to conduct an estimate of the appointees Personal and Scholarly Effects.

5.2. The University will make all Removal arrangements and obtain all the required quotations and contact local agents near the present address of the new appointee to arrange a visit to the appointee's home to make estimates.

5.3. The agent will prepare a quotation for the University and the appointee will receive with their portion of the moving company's expenses for review and approval.

5.4. Upon review and approval by both the University and the appointee, the University will advise the agent to proceed with the move and issue a purchase order.

5.5. The University will pay the total amount of the moving company's invoice for Removal of the Personal Effects and Scholarly Effects and invoice the new appointee for their portion of the moving company's invoice, if applicable. The appointee has ten (10) days to remit payment to the University for their invoice.

5.6. If after the University carrier has made an estimate, the appointee chooses to use another moving company, all Removal arrangements will be made by the appointee and the appointee will be reimbursed as per section 4.1(b) with proper Receipts.

6. Expense Reimbursement

6.1. After arrival at their new place of employment with the University, the appointee will submit a request for reimbursement to the financial or administrative officer within their new unit using the *Employee Settlement Claim Form*.

6.2. Eligible expenses are outlined above. Expenses such as but not limited to legal fees associated with the purchase or sale of housing, passports, alcohol, entertainment, laundry, car rentals, etc., are not eligible for reimbursement.

6.3. In providing financial assistance for moving expenses, the University does not assume any liability, nor will it be held responsible for injury or loss which may arise during or as a result the move to the applicable campus.

6.4. If the appointee does not complete two years of service, they are responsible for repaying 50 per cent of any Relocation and Removal expenses that were reimbursed or paid by the University.

Related Documents

Employee Settlement Claim Form
Procedure for Familiarization Visits
Procedure for Relocation of Postdoctoral Fellows
Procedure for Travel Expense Management
Schedule of Reimbursable Expenses

Policies using this Procedure:

Hosting Policy
Travel Expense Management Policy