



**UNIVERSITY OF
CALGARY**

Relocation Expense Guidelines

Operating Standards and Practices

**Human Resources
People, Process and Solutions**

July 2022

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I. Introduction

The purpose of this guideline is to outline the process and terms and conditions under which relocation expenses incurred by eligible employees will be reimbursed. This guideline applies to eligible Academic Staff and Senior Leadership Team (SLT) Members, hereafter referred to as “Staff Members”.

Staff Member eligibility, eligible costs, relocation allowances and business processes are outlined next. The University of Calgary will work with relocating Staff Members, to help them understand their eligibilities and to liaise with the moving company to ensure a positive and transparent relocation experience.

II. Eligibility

Staff Members will be notified that they are eligible for relocation assistance in the President’s or Provost’s Offer of Appointment letter. Relocation allowances are intended to reduce the financial impact of relocation and may not cover all costs associated with relocation. Detailed eligibility information is included in section III.

See Appendix B for information regarding financial obligations related to **Return in Service** when a Staff Member leaves their position within 24 or 36 months of their start date.

III. Moving - Eligible Costs and Relocation Allowances

The following expenses are eligible costs and are paid directly by the university to the moving company **provided the total cost does not exceed the allowable maximums:**

- packing, loading, delivery and unloading of personal and household effects from the primary (or additional) residence
- transportation of one personal vehicle, when counted among personal goods
- en route insurance (replacement value)
- one month’s storage of personal goods, when included in original quote
- lawn mowers, snow blowers and motorcycles (provided they meet all necessary regulations), when counted among personal goods
- appliance servicing (disconnecting, moving and reconnecting)
- transportation of swings and playground sets (provided dismantling and reassembly are done by the Staff Member), when counted among personal goods
- transportation of laboratory equipment, with appropriate documentation (see section V – Additional Information for more details)

Items that are NOT eligible for reimbursement or insurable can be found in Appendix C. Details related to multiple locations, storage, appliance servicing and transportation of automobiles can be found in Section V - Additional Information.

Moving Allowances

Eligible Staff Members receive a relocation allowance based on the number of eligible dependents in the household, to a maximum of five (5) people, and their place of origin. Due to higher tariff rates, US and International moves have a separate allowance schedule. Please refer to the tables below to determine the maximum allowance a Staff member is eligible for. **The maximum allowance is based on a relocation cost of \$1.50 per pound for moves within Canada and \$1.80 for US and International moves. Staff Members may exceed their eligible maximum allowance, regardless of weight of household goods, with the understanding that the University may not cover the full amount.**

Moves within Canada

| *Number of Family Members Relocating | Maximum Allowance | Max Weight (lbs) |
|--|--------------------------|-------------------------|
| Staff Member | \$9,000 | 6,000 |
| Staff Member and Partner | \$15,000 | 10,000 |
| Staff Member, Partner & 1 Dependent | \$16,500 | 11,000 |
| Staff Member, Partner & 2 Dependents | \$18,000 | 12,000 |
| Staff Member, Partner & 3 Dependents or more | \$19,500 | 13,000 |
| Staff Member & 1 Dependent | \$10,500 | 7,000 |
| Staff Member & 2 Dependents | \$12,000 | 8,000 |
| Staff Member & 3 Dependents | \$13,500 | 9,000 |
| Staff Member & 4 Dependents or more | \$15,000 | 10,000 |

When both partners are eligible Staff Members, they may submit a joint claim for relocation expenses and claim an aggregate allowance of \$18,000, plus \$1,500 for each eligible dependent, to a maximum of \$22,500.

| Number of Family Members Relocating | Maximum Allowance | Max Weight (lbs) |
|--|--------------------------|-------------------------|
| 2 Staff Members | \$18,000 | 12,000 |
| 2 Staff Members & 1 Dependent | \$19,500 | 13,000 |
| 2 Staff Members & 2 Dependents | \$21,000 | 14,000 |
| 2 Staff Members & 3 Dependents or more | \$22,500 | 15,000 |

US and International Moves

| *Number of Family Members Relocating | Maximum Allowance | Max Weight (lbs) |
|--|--------------------------|-------------------------|
| Staff Member | \$10,800 | 6,000 |
| Staff Member and Partner | \$18,000 | 10,000 |
| Staff Member, Partner & 1 Dependent | \$19,800 | 11,000 |
| Staff Member, Partner & 2 Dependents | \$21,600 | 12,000 |
| Staff Member, Partner & 3 Dependents or more | \$23,400 | 13,000 |
| Staff Member & 1 Dependent | \$12,600 | 7,000 |
| Staff Member & 2 Dependents | \$14,400 | 8,000 |
| Staff Member & 3 Dependents | \$16,200 | 9,000 |
| Staff Member & 4 Dependents or more | \$18,000 | 10,000 |

When both partners are eligible Staff Members (US and International moves), they may submit a joint claim for relocation expenses and claim an aggregate allowance of \$21,600, plus \$1,800 for each eligible dependent, to a maximum of \$27,000.

| Number of Family Members Relocating | Maximum Allowance | Max Weight (lbs) |
|--|-------------------|------------------|
| 2 Staff Members | \$21,600 | 12,000 |
| 2 Staff Members & 1 Dependent | \$23,400 | 13,000 |
| 2 Staff Members & 2 Dependents | \$25,200 | 14,000 |
| 2 Staff Members & 3 Dependents or more | \$27,000 | 15,000 |

Additional Expenses

In general, the university will pay the moving company for the cost of relocating household goods, as long as it is within the Staff Member’s maximum allowance thresholds. If the cost of household goods exceeds the maximum allowance, the **Staff Member will be billed directly by the relocation provider.**

Several factors may increase the cost of relocation and potentially cause a move to exceed the university’s allowable dollar maximums, even when the total weight is within defined maximums. Although not an exhaustive list, here are the most common factors that contribute to increased relocation costs:

- Accessibility to the residence. (i.e.: Shuttle charges when the origin or destination are not trailer accessible; long carry charges if the residence is an excessive distance from the truck, etc.)
- Parking Permits (when required)
- Heavy items. (i.e.: pool tables, trampolines, pianos, treadmills, home gyms, etc.)
- Bulky/Oversized items that are comparatively light but occupy space that is not commensurate with their weight. (i.e.: Kayaks, canoes, etc.)
- Crating for fragile/valuable or difficult to move items (i.e. art)
- Items requiring third party involvement to pack/unpack or move
- Automobiles
- Distance between origin and destination
- Air Shipments (Freight is significantly higher than other forms of transportation)
- Extra pickup from campus office or second home
- Storage of goods (beyond the first month)

Staff Members are encouraged to work with the moving company to identify any opportunities to keep the cost of relocating within allowable maximums. The moving company representative will respond to any questions concerning the quote provided. The university Relocation Administrator can assist with the interpretation of the regulations outlined in this document.

IV. The Relocation Process

The university has three preferred vendors for moves. Each move will be subject to a bidding process in which at least two vendors will reach out to the Staff Member to secure the pre-move survey and provide the University with a quote. The University reserves the right to choose the vendor; with

everything else being comparable, the awarding of the move will go to the vendor providing the lower cost.

1. Upon notification of the appointment, the university Relocation Administrator will reach out to the Staff Member, introduce themselves and provide an overview of the process and their contact information for any questions or issues that may arise.
2. A relocation specialist from the moving company(s) will connect with the Staff Member regarding the overall relocation process. They will review the relocation allowance eligibilities, help the Staff Member understand the types of services that may be required, and explain how those services may impact the allowance provided by the university (refer to Section III). During the pre-move survey the moving company will inventory all household goods. The Staff Member will assist the representative by pointing out any unusual or valued belongs that may require special handling and/or additional services, such as crating, storage and the movement of automobiles. The moving company will confirm the estimate of household goods to the Staff Member from which the quote will be generated. The representative will provide printed material outlining items that cannot be moved as governed by Transport Canada and Canada Boarder Agency regulations.

It is important that the Staff Member deal directly with the designated representative to coordinate:

- Packing, loading and delivery dates
- Storage requirements
- Delivery destination address
- Any special requirements

Details of each of these activities are outlined in Section V - Additional Information.

It is important to understand the scope of services that are requested during the relocation survey, as services such as crating, storage and shipping automobiles, can be expensive and will often cause a quote to exceed university allowances. Again, if the cost of the move exceeds maximum allowances, the Staff Member will be billed directly by the relocation provider for costs related to the overage.

3. The relocation vendor(s) will forward the estimate to the university Relocation Administrator. After the quotes have been received, the Relocation Administrator will review the quotes, select the appropriate vendor, connecting with the hiring faculty as required.
4. The relocation administrator will then connect with the Staff Member, to confirm selection of the appropriate vendor.
5. After the confirmation of the selected vendor, the Relocation Administrator will connect with the selected vendor to initiate the scheduling of the packing, loading and delivery activities with the Staff Member.

6. The University will pay the moving company directly for all eligible relocation expenses up to the maximum allowance. The Staff Member will be billed by the moving company for any additional expenses over the allowable maximum (see Section III).

V. Additional Information

Packing, Loading, Delivery

- Packing, loading and unloading will normally be completed on a weekday. The household effects will be packed on one day and loaded on the moving van the following day. It is important that the Staff Member or another responsible adult be present during the process.
- The moving company will present a complete inventory sheet itemizing all goods packed for transport to the Staff Member once all the goods have been loaded on the moving van.
- The moving company will provide the Staff Member with an estimated delivery time frame unless the goods are going into storage. The moving company will reimburse the Staff Member for hotel and meal expenses caused by the delayed arrival of the transported goods based on terms set out in the contract between the University and the moving company.
- The Staff Member will provide the driver with a contact telephone number in Calgary. The moving company representative will call this number 24 hours prior to delivery to confirm all details.
- The Staff Member or another responsible adult will be present to confirm and accept receipt of transported goods. If there is any damage on the exterior of the boxes, the Staff Member will bring it to the attention of the driver, initial the inventory sheet and ensure the moving company driver initials it as well.

Storage

- Storage of goods not contemplated in the original quote will only be covered by the university if the total does not exceed the allowable maximum allowance when combined with the rest of the moving costs.
- The moving company will bill the Staff Member directly for the cost of storage beyond 30 days.
- The moving company representative will provide quotes for these costs based on the university's corporate rate.
- The Staff Member will be responsible for paying any costs associated with access to the goods while they are in storage.

Multiple Locations

Moving household effects or personal items from or to multiple locations (i.e. more than one house, or house and office) are acceptable if the total cost of all moves do not exceed the allowable maximum allowance.

Insurance

Household goods, except those listed in Appendix C, are typically insured for their replacement value while they are in the custody of the moving company.

In the event of damage or loss, the Staff Member has to file a claim with the moving company. The moving company will attempt to settle claims within 30 days upon receipt of the form. Whenever possible, the item will be repaired rather than replaced.

If there is some difficulty with a claim, the Staff Member should contact the moving company.

Automobile

Transportation of one personal vehicle is an eligible expense when counted among personal goods and falls within the maximum allowance provided.

The transportation of an automobile is not included in the maximum weight of a move. It is an additional and separate cost from the move of household goods. **In general, transportation of cars may cause the cost of a move to exceed allowable maximums.**

Laboratory Equipment

Costs associated with moving lab equipment may also be covered by the hiring faculty if approved by the Provost and Deputy Provost. The moving company will ship laboratory equipment if it is an eligible relocation expense and is accordance with the following:

- The Staff Member has written authorization from both the leaving institution and the Dean and/or Department Head of the affected faculty at the university as well as approval by the Provost of the university, and; provides certification that the equipment is free of all detectable chemical, radioactive and/or bio-hazardous contamination.
- Eligible laboratory equipment that is shipped from a country other than Canada will be shipped separately from the personal household effects. The Staff Member will provide the moving company with a detailed list of the equipment. The list will identify each item with a complete description and include the fair market value (in the currency of the country from which the equipment is being imported) and the country of manufacture for each piece of equipment.
- Eligible laboratory equipment that is shipped within Canada may be shipped together with the personal household effects. The Staff Member will provide the moving company with detailed list of the equipment as described above.
- Alternative shipping arrangements may be made for eligible laboratory equipment required prior to the date scheduled for the shipment of household goods.
- The moving company will provide copies of the detailed lists as described above to the Relocation Administrator, who will forward it to the Traffic Section of Supply Chain Management for proper customs clearance.
- The lab equipment will ordinarily become the property of the university.
- The moving company may ship laboratory equipment that is not deemed eligible; however, the Staff Member is fully responsible for the shipment and will be billed directly for all associated costs.

Advance Shipping

Personal effects required prior to the move may be shipped by the lowest cost alternative. The moving company can make arrangements for reduced rates.

The cost and weight of the goods shipped in advance will be included in the calculation of the total maximum allowance provided.

The University will cover the cost of the advance shipment provided that the total maximum allowance has not been exceeded (see Section III). The receipt must show the weight or volume of the goods shipped.

VI. Personal Allowances, Travel, Legal and Immigration Expenses

A Personal Allowance reimbursement is provided for, up to \$600 per Staff Member, to cover incidental moving expenses such as meals, taxi fares, childcare, vehicle inspections, utility connection, etc. Additionally, other Travel, Legal and Immigration expenses may be eligible (see below) but are to be paid by the Staff Member and expensed.

Expenses are reimbursed upon submission of Relocation Claim Form and original receipts. All expense claims must be filed within 12 months of the date of appointment.

Travel Expenses

The following travel expenses are reimbursed, when supported by itemized receipts and submitted through the university's expense module:

- Cost of economy airfare calculated by the most direct route to Calgary for the Staff Member, spouse or partner and eligible dependents.
- **\$0.50 per kilometer OR fuel consumption with receipts** when the Staff Member's personal vehicle is used for relocation transportation. Reimbursement will be based on the most direct route, plus lodging and meals (supported by receipts) en route for a reasonable number of days.

When a second vehicle is used for transportation or a trailer or similar vehicle is towed for the purpose of providing accommodation en route and/or transporting household and personal effects, an **additional allowance of \$0.23 per kilometre** will be reimbursed.

- Lodging expenses and meals (supported by receipts) for a maximum period of 3 days upon arrival in Calgary will be reimbursed to the Staff Member.

Submitting a Claim

Reimbursement of eligible travel expenses are claimed electronically through submitting a relocation expense (in PeopleSoft) and attaching copies of supporting documentation. The university Relocation Administrator will send instructions on how to expense claims.

Legal Expenses

The university will reimburse the Staff Member for legal expenses incurred in selling their residence and purchasing their principal place of residence in the Calgary area up to a maximum of \$1,000. Claims may be made by submitting the original receipts with a relocation claim form.

Immigration Expenses

The university will pay for the listed expenses related to immigration for the Staff Member, accompanying spouse/ common-law partner and dependent children to a cumulative maximum of \$6,000. Immigration expenses beyond the allowable maximum must be approved by the Provost. Claims may be made by submitting the original receipts with a relocation claim form. Claims made beyond 48 months of the date of university appointment may require approval by the Provost.

- translation and certification of documents where translation is required by the Government of Canada
- medical examinations required by the Government of Canada
- immigration fees levied by the Government of Canada
- police criminal record checks and fingerprinting
- photos for permanent residence application
- postage or courier fees

The University does not pay for:

- immigration or border fees levied by foreign governments
- passports
- legal services
- registration of vehicles
- fees associated with obtaining an Alberta Driver's License
- travel costs associated with obtaining a work permit
- citizenship application fees
- renewal of permanent residence fees

Some items may be eligible to claim under personal taxes, please refer to Canada Revenue Agency's guidelines for more information.

VII. Contact Information

For any questions regarding these guidelines please contact the university Relocation Administrator at hracadem@ucalgary.ca.

For any questions specific to a move please contact the chosen preferred vendor.

Appendix A - Glossary

| | |
|----------------------------|---|
| Staff Member | Continuing, contingent and full-time limited term (teaching or non-teaching) Board appointments as defined in the procedures pertaining to Appointment, Promotion and Tenure (Academic Staff) or employees of the university, who at the time of appointment, are designated as members of the Senior Leadership Team. Faculties or units may request the services of the university's preferred relocation vendors in support of a move for Management and Professional (MaPS) staff, but they are not eligible for an allowance from central funding. |
| Unit | A University faculty, department, school or other organizational entities within the University |
| Permanent Residence | The Staff Member's principal domicile |
| Relocation Expenses | Eligible costs associated with the physical removal of a newly appointed Staff Member and his/her spouse or partner and eligible dependents from their permanent residence to Calgary or area in order to take up duties at the University of Calgary |
| Dependent | <p>Staff Member's child, grandchild, brother, sister by blood, marriage, common-law partnership or adoption if under 18 years of age or mentally or physically impaired; or</p> <p>Staff Member's parent or grandparent by blood, marriage, common-law partnership or adoption</p> |
| Eligible Dependent | <p>Staff Member supported in the preceding year; and lived with Staff Member in a home that Staff Member maintained</p> <p>An individual is not an Eligible Dependent if he or she is visiting Staff Member or only living with Staff Member temporarily. Documentation demonstrating dependent status will be required for eligibility. Any exception to these definitions will be considered on a case by case basis by the Associate Vice President, Human Resources</p> |
| University | The University of Calgary |

Appendix B – Return-in-Service Commitment

As outlined in the Staff Member's Offer of Employment, should you voluntarily leave the university before completing the required return-in-service commitment, a pro rata amount of the reimbursed

costs is repayable. The return-in-service commitment will be calculated using one of the following two ratios:

- Move within Canada: 1 month of regular service (exclusive of unpaid leave periods) discharges 1/24th of the obligation; or
- Move from outside Canada: 1 month of regular service (exclusive of unpaid leave periods) discharges 1/36th of the obligation.

If no other repayment arrangements have been made by the employee, any amount owing will be deducted from the employee's salary or from any other amounts due and owing to the employee.

Appendix C - Items Not Eligible for Reimbursement or Insurable

The following items are NOT eligible for reimbursement because they either barred from transport from outside of Canada and/or because they are difficult and costly to move.

- recreational vehicles such as trailers, campers, motor homes, ATVs etc.
- building materials such as lumber, cement, bricks, patio slate, sand, gravel, etc.
- construction equipment, farm equipment, tractors
- firewood, railroad ties
- paints, cleaning solvents, aerosols or flammables including matches, lighter fluid, gasoline, cleaning fluids, fertilizers
- ammunition, explosives and registered fire arms
- propane tanks, empty or full
- perishables, including frozen food, dry goods and spices subject to freezing
- livestock, fish, birds, or
- swimming pools and outbuildings, storage sheds or greenhouses

For more information, please refer to the following websites: Canada Border Services Agency, Transportation Canada, and the Canadian Food Inspection Agency

The following items are typically not insurable through the moving company:

- wine, liquor and liquids of any kind (not eligible through the university's relocation program)
- jewelry, precious stones
- money in any form; cash, securities, bonds, notes
- collections (stamps, coin and articles of similar high value)
- fur coats
- legal documents, or
- photographs and valuable works of art

The moving company may assist the Staff Member in arranging alternate transport (if allowable) or insurance for any of the listed items.