

**UNIVERSITY OF DAYTON**

<b>TITLE:</b> Relocation Allowance	
<b>EFFECTIVE DATE:</b> July 26, 1993	<b>APPROVAL:</b> President's Council July 26, 1993 - Approved as Amended December 11, 1995 Approved as Amended August 7, 2000
<b>REFERENCE:</b> Purchasing Policies and Procedures	
<b>I. PURPOSE, DEFINITIONS PROCEDURES</b>	
<p>The University seeks to assist employees who are required to move for University business. For this reason the following policy has been established:</p>	
<ol style="list-style-type: none"><li>1. The University provides a moving allowance for full-time faculty and staff who, in order to accept employment at the University, must change their permanent residence from outside the metropolitan area of Dayton beyond commuting distance to this locale. The allowance is provided in order to cover a portion or all of the cost of the move of household goods, one (1) "house-hunting" trip and the cost of final transportation to Dayton.</li><li>2. The allowance provides for payment by the University of all allowable moving expenses, one house hunting trip and final transportation. This amount is reviewed for adjustment on an annual basis by the Director of Purchases.</li><li>3. Amounts paid by the University on behalf of the employee or reimbursement to the employee are considered income and will be included on a W-2 report to the IRS at the end of the year. Moving expenses that are deductible (reported as a fringe benefit on W-2) include cost of moving household goods and personal effects; travel to new location for actual move; and lodging during travel to new location. Moving expenses that are not deductible (added to taxable income and withholding required) include all house hunting expenses and meals, even during move to new location. Employees are encouraged to speak to their personal tax advisors regarding their personal scenario.</li></ol>	
<b>4. Moving Procedures</b>	
<ol style="list-style-type: none"><li>A. The Department Chair or Divisional Director must provide the individual's name, current address, and phone number as soon as the employee accepts the position. The Purchasing Department will contact the individual to be moved to explain our policies and local moving companies to coordinate an appointment to examine the goods to be moved and to provide a written estimate.</li></ol>	

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In some cases individuals who live in close proximity or have a limited number of items to move may be interested in considering a self move. The Director of Purchases will work with the new employee to suggest methods and safeguards in this procedure.

- B. The employee who is moving should be certain that the mover inspects all items that are to be moved (including those in closets, drawers, basement, attic, garage, etc.). Once the University is given an estimate avoid adding or withdrawing any items. Be sure any heavy items such as books are included in the estimate.
- C. The mover's estimate should include the following items and details:
  - 1. Total charge for hauling to destination, including the number of miles estimated weight and tariff rate per 100 lbs.
  - 2. Itemized costs:
    - a. Cost of packing, cost of containers, (itemize number of barrels, boxes, cartons, etc.).
    - b. Cost to unpack all items.
    - c. Total packing and unpacking charge.
  - 3. Insurance charge (declared value, rate and type of coverage).
  - 4. Normal appliance service (at both departure and destination).
  - 5. Loading and unloading charges, if any.
  - 6. Total costs for move:
    - a. Estimated Costs
    - b. Fixed Costs
    - c. Applicable Discounts

NOTE: Only Item 1 should be an estimated cost since the tariff rates are applied to the actual scale net weight of the goods. An accurate estimate can be made, if all goods are made available for examination under items 2, 3, 4, and 5. The University will pay other amounts listed only if they do not unreasonably exceed the actual amount quoted.

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- D. Written quotations obtained as above should be forwarded to Mr. Ken Soucy, Director of Purchases, University of Dayton, 300 College Park, Dayton, OH 45469-1664.
- E. The Director of Purchases is responsible to select an appropriate mover. The University policy is to obtain at least three (3) quotations for moves being made at University expense. A Purchase Order covering the services desired will be issued to an agent of the moving company in Dayton. The local agent will contact the mover in the employee's current city of residence, who will contact the prospective employee.
- F. Any damage incurred during the move should be reported immediately to the mover. It is the responsibility of the employee to file any claims and to follow them through. If Purchasing is notified that a claim has been filed, it might be possible to withhold payments of the mover's invoice until such claims are resolved.
- G. The University will not pay or share the cost to move certain items including, but not limited to: boats, automobiles, swimming pools, animals, trailer, firewood, lumber, bricks, play houses, plants, paints, auto parts; nor the labor for removing or cleaning curtains, carpet, or for the disassembly or packing of complex items such as pool tables, play equipment or antennas or piano surcharges. If such items are involved in a move please notify the Director of Purchases who will have the items separately quoted.
- H. If any unusual circumstances occur or questions arise that are not covered herein, please contact the Director of Purchases, at 937-229-2641 who will obtain the necessary information or policy decision.

### House Hunting

For new employees who are house hunting, the Relocation Allowance Policy covers costs of travel to Dayton and food and lodging while on a trip for the purposes of locating a new residence.

### Final Transportation

This policy also provides for reimbursement for the actual cost of transportation to the new residence. Such costs include transportation, food, and lodging if necessary during the trip involved in the actual move. The University does not reimburse for personal items, or extra trips during the move.

When traveling by personal auto in house hunting or final transportation the mileage will be reimbursed by the University at the established rate by the IRS

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Costs for house hunting and the final move should be itemized in a memo to Purchasing listing each individual expense and enclosing receipts. Receipts are required for any item over \$15.

### II. RESPONSIBILITY FOR ENFORCEMENT, REMEDIES, SANCTIONS

Supervisors of departments or department chairs should review with the employee the need for relocation and what assistance the University might provide. The appropriate Vice President or Dean should contact the Purchasing Department before any arrangements are made.

### III. APPEAL PROCESS

Any requests for exceptions to this policy should be directed to the appropriate Vice President or Dean and the Vice President for Finance and Administrative Services.

**MAINTENANCE OF POLICY:** V.P. for Finance and Administrative Services and V.P. of Human Resources