



**The University of British Columbia
Board of Governors**

Policy No.:
82

History:
1) February 1980, BOG Approved
2) March 2007, BOG Approved

Responsible Executive:
Vice-President, Human Resources

Title:
Relocation of Faculty Members and Senior Management Staff

Background & Purposes

The Principle

UBC is committed to attracting and retaining outstanding faculty members and senior management staff from around the world.

The Purpose

This Policy is intended to facilitate the hiring or internal transfer of outstanding faculty members and senior management staff by establishing eligibility and extent of travel and relocation assistance to move their homes, family, offices, and tools of the trade as necessary to establish these faculty and staff at *UBC*.

Note: Who Should Read This Policy

Generally:

- All administrative heads of units engaged in hiring or transfers
- New hires or transfers

Specifically:

- *Responsible Executive*

Related Policies, Materials, And Notes

For further information on related issues (removal and travel expenses) please review:

- Policy 83 *Travel and Related Expenses*

End of Cover page / Cover Notes

1. **Governing Principles**

1.1. **Principles:** *UBC* is committed to attracting and retaining outstanding faculty and senior management staff from around the world.

1.2. **Purposes:** This Policy is intended to:

- 1.2.1. facilitate the hiring or internal transfer of outstanding faculty members and senior management staff by establishing eligibility and extent of travel and relocation assistance to move their homes, family, offices, and tools of the trade as necessary to establish these faculty and staff at *UBC*; and
- 1.2.2. aid faculty members and senior management staff who are *Designated Professionals* to relocate by providing access to an efficient and user-friendly service.

1.3. **Methods:** To succeed in its goals *UBC* will:

- 1.3.1. establish a flexible relocation plan providing a range of allowable expenses within expenditure ceilings;
- 1.3.2. maintain a central account to fund a common level of contribution towards administrative unit relocation expenses; and
- 1.3.3. identify and inform the *Designated Professionals* intended to be covered by the Policy.

2. **Definitions and Interpretation Rules:** A schedule to this Policy establishes the definitions of terms used in this Policy and any unique rules of interpretation that apply to this Policy.

3. **Scope**

3.1. **General:** This Policy sets out the allowable expenses and the resources available from *UBC* to facilitate the relocation of people who move their homes, family, offices, and *Tools of the Trade* as part of undertaking employment (new hire or transfer) as a *Designated Professional*.

3.2. **Exclusions:** This Policy does not apply to any move or travel for any person who is already residing within 75 kilometers of the new workplace.

3.3. **Exceptions:** In exceptional circumstances exceptions to this Policy (inclusive of Procedures) may be made by:

- a) the *Responsible Executive*; or
- b) the *Administrative Head of Unit* responsible for the hiring or transfer of the *Designated Professional* and the funding of the exception.

4. **Eligibility for Relocation and Travel Expenses**

- 4.1. A *Designated Professional* becomes entitled to relocation assistance services and relocation expenses up to a cumulative maximum and any limits set for a category of expenses under this Policy or its Procedures when advised of eligibility in writing (e.g. in an offer letter) by the *Responsible Executive*, or the *Administrative Head of Unit* responsible for the hiring or transfer of the person.
- 4.2. Travel and related expenses arising under this Policy are to be included and accounted for as relocation expenses. Policy #83 *Travel and Related Expenses* shall apply to travel and related expenses under this Policy and interpreted with any necessary changes in wording so as to give effect to this provision and function consistent with this Policy.

5. **Arranging and Paying for Relocations and Travel**

- 5.1. The *Responsible Executive*, or delegate, may designate:
- 5.1.1. forms, reports, or applications as may be required, except where designated by the Vice-President, Administration and Finance for financial administration; and
- 5.1.2. a relocation company, if specified, to provide services to a *Designated Professional* consistent with *UBC* policies in place of, or in addition to, *UBC* services.

6. **Election of House Hunting Trip or Arrival Lodging:** A *Designated Professional* may elect, under the *Flexible Relocation Plan*, to have *UBC* expense coverage (to the allowed limits) for either (but not both) a pre-move house hunting visit, or temporary lodging after arrival to take up the offered position.

7. **Relocation Move:** *UBC* will pay, under the *Flexible Relocation Plan*, for the following expenses for the *Designated Professional*, *Spouse*, and *Dependant(s)* up to, in each case, the allowed limits:

7.1. **Relocation Travel:** Travel from old to new residence (if consistent with Policy #83 *Travel and Related Expenses*);

7.2. **Moving Expenses:** Moving expenses from the *Allowed Moving Expenses* list of:

- a) *Household and Personal Effects* (a weight allowance may apply); and
- b) *Tools of the Trade*.

7.3. **Automobile Expenses:** One personal passenger automobile to be shipped or driven.

7.4. **Customs and Immigration:** Allowed customs and immigration related expenses. Customs and immigration matters remain the responsibility of the *Designated Professional*. *UBC* cannot advise on these matters but will provide administrative assistance and any documentation required from *UBC* as an employer.

8. **Healthcare:** Healthcare insurance may be provided under this Policy for a *Designated Professional* and some or all family members to cover the 3 month

waiting period before the British Columbia's Medical Services Plan and before the UBC employee benefits plan apply.

9. Early Departure from Employment

9.1. As a term for provision of benefits under this Policy a *Designated Professional* who voluntarily leaves the service of UBC before completing 24 months of paid service will be required to refund a portion of the funds expended by UBC under this Policy regarding the *Designated Professional*. This applies whether the funds were paid to service providers or to or for the *Designated Professional*. The refund portion shall diminish over time from 100% to zero with each completed month of regular service, excluding periods of unpaid leave, discharging 1/24th of the amount.

9.2. The *Administrative Head of Unit* responsible for the hiring or transfer of the *Designated Professional* is responsible for administration of this section (early departure).

10. Procedures and Amendment

10.1. The President may, on an ongoing or limited basis, delegate to the *Responsible Executive* the power to amend numeric text in the Procedures under this Policy. The *Responsible Executive* shall report any such amendment to the next meeting of the Board of Governors.

Schedule to Policy 82
Definitions and Other Interpretation Rules

1. Definitions


In Policy 82 *Relocation of Faculty Members and Senior Management Staff* the following terms have the meaning defined below, and shall have the same meaning in any administration and management procedures under that Policy:

- a. **“Administrative Head of Unit”** means the “administrative head of unit” as defined under Policy #1 as amended from time to time.
- b. **“Allowed Moving Expenses”** means the “Allowed Moving Expenses” as defined in the *Flexible Relocation Plan*.
- c. **“Dependant”** means a person who ordinarily resides with the *Designated Professional* and is the *Designated Professional’s or Spouse’s*:
 - 1) unmarried child who is wholly dependent (excepting for minor financial capacity) on the *Designated Professional or Spouse* and
 - a. under the age of 19 years; or
 - b. 19 years of age or older and dependent by reason of mental or physical infirmity;
 - 2) unmarried child under the age of 25 years who is in full-time attendance at an accredited educational institute; or
 - 3) parent, or spouse of a parent, provided that the person is wholly dependent (excepting for minor financial capacity) on the *Designated Professional or Spouse* financially or by reason of mental or physical infirmity.
- d. **“Designated Professional”** means people who:
 - 1) are advised in writing (e.g. in an offer letter) by the *Responsible Executive*, or the *Administrative Head Of Unit* responsible for the engagement of the *Designated Professional*, that they are eligible; and
 - 2) are or agree to be employed by *UBC* in one of the following full-time positions:
 - a. a tenure-stream faculty member;
 - b. a prospective tenure-stream faculty member (e.g. professorial ranks, Instructor I and II, Senior Instructor); or
 - c. any of the following defined or designated by the *Responsible Executive* as eligible (this designation may be on an individual basis or by group, and may be on an ongoing, limited or one-time-only basis):
 - i. librarian in senior management;
 - ii. Program Director in Continuing Studies; or
 - iii. senior management staff.

The term “*Designated Professional*” does not include any position held in a temporary, visiting, or like capacity (e.g., visiting professor or sessional lecturer) except to the extent designated by the *Responsible Executive* as eligible.

- e. “***Flexible Relocation Plan***” means the “Flexible Relocation Plan” as described in the Procedures in which a *Designated Professional* may select from a range of relocation expenditures covered by *UBC* within plan limits.
- f. “***Household and Personal Effects***” the “Household and Personal Effects” as defined in the *Flexible Relocation Plan* to re-establish the *Designated Professional’s* household after a move.
- g. “***Responsible Executive***” means:
 - 1) the individual(s) specified by the President, from time to time, to be responsible for this Policy; and
 - 2) any person delegated by the person in 1) above to fulfill his/her role except to the extent that the power to delegate is specifically excluded in this Policy or in the appointment by the President.
- h. “***Spouse***” means one spouse or common law partner of a *Designated Professional*.
- i. “***Tools of the Trade***” means the *Designated Professional’s* tools of the trade that are necessary and related to the *Designated Professional’s* employment with *UBC* as permitted in the *Flexible Relocation Plan*, e.g. an office library, computer equipment, or research equipment and supplies.

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| Approval | |
| Certified Approved by Board of Governors | March 22, 2007 |
| | Date Approved |
| <i>Nina Robinson</i> | April 3, 2007 |
| Board Secretary | Date Signed/Sealed |

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|  | Policy No.: 82 | <p style="text-align: center;">Authorized Procedures</p> | Procedure Version No.: 2 (since adoption of last policy version) | Procedure History: 1) March 2007 – BOG Approved Procedures with Policy 2) December 21, 2017 – Responsible Executive Amended Authorized Procedures Next Review: Annually |
| Title: <p style="text-align: center;">Relocation of Faculty Members and Senior Management Staff</p> | | | | |
| Related Procedures, Materials, And Notes Pursuant to Policy #1 – Administration of Policies, “Procedures may be amended by the President, provided the new procedures conform to the approved policy. Such amendments are reported at the next meeting of the Board of Governors.” Note: the most recent procedures may be reviewed at http://universitycounsel.ubc.ca/policies/index/ . Pursuant to Policy 82 the President may delegate certain power to amend schedules. | | | | |
| End of Cover page / Cover Notes | | | | |

PROCEDURES

1. **Definitions and Interpretation Rules:** An attached schedule establishes the definitions of terms used in these Procedures and any unique rules of interpretation that apply.
2. **Flexible Relocation Plan – Flexible Expenditures Range within Cost Limits**
 - 2.1. **Flexible with Cap:** UBC will pay relocation expenses from the range of expenses set out in the following section (“Flexible Relocation Plan – Coverage Range”) up to any limits specified in the Policy or Procedures applying to:
 - a) any category of expenses; and
 - b) a cumulative maximum for all relocation expenses (which includes relocation travel and related expenses).
 - 2.2. **Exceeding the Cap:** Relocation expenditures otherwise consistent with the *Flexible Relocation Plan* but in excess of the individual or cumulative total for

the plan must be authorized in advance by the administrative unit. These excess expenditures are administrative unit expenses and not centrally funded.

2.3. Piecemeal Moves: Piecemeal moves are not desirable due to increased complications and cost. The cost of piecemeal moves of a category of effects may not exceed the expense that would otherwise apply to a single consolidated move.

3. Flexible Relocation Plan – Coverage Range: The range of expenses covered under the *Flexible Relocation Plan* for any *Designated Professional* is described below in this section:

3.1. Election of Pre-Move Travel or Post-Move Temporary Lodging: UBC will pay expenses for either (but not both) of the following (if expended consistent with Policy #83 *Travel and Related Expenses*):

3.1.1. House hunting expenses consisting of the following for up to 2 people for up to a total of 7 days:

- a) Return *Travel Allowance*;
- b) Lodging;
- c) *Meal Allowances*; and
- d) *Dependant Care Allowance*.

3.1.2. Post-move temporary lodging expenses consisting of the following for the *Designated Professional*, *Spouse*, and *Dependant(s)* for up to a total of 14 days:

- a) Lodging;
- b) *Meal Allowances*; and
- c) *Dependant Care Allowance*.

3.2. Relocation Travel: UBC will pay expenses for travel from old to new residence (if expended consistent with Policy #83 *Travel and Related Expenses*) as follows:

- a) One-way *Travel Allowance* to the relocation destination; and
- b) *Meal Allowances* and lodging en route

3.3. Moving Goods: UBC will pay expenses for *Allowed Moving Expenses* up to the maximum applicable amount specified in the *Rates Table* for:

- a) *Household and Personal Effects* moved from an old to new residence; and
- b) *Tools of the Trade* moved to a new UBC workplace if approved by the *Responsible Executive*, or the *Administrative Head of Unit* responsible for the engagement of the *Designated Professional*.

3.4. Automobile Transport: One personal passenger automobile may be shipped or driven as part of a move under the Policy. *UBC* will pay up to the amounts permitted by the *Rates Table*.

3.5. Customs and Immigration: *UBC* will pay customs and immigration expenses to the extent listed, and up to the stated individual or cumulative expense limits, in the *Rates Table*. The list of expenses may include premiums for healthcare insurance for the *Designated Professional* and some or all family members being moved.

4. Healthcare

4.1. Healthcare insurance is provided under this Policy to a *Designated Professional* and family members to the extent that the *Designated Professional* and eligible family member sought to be covered are enrolled and entitled under:

- a) a healthcare benefits plan offered by *UBC*; or
- b) healthcare insurance specifically purchased as part of customs and immigration expenses permitted under the *Rates Table*.

5. Tools of the Trade

5.1. Authorization: Before *Tools of the Trade* may be moved under this Policy moving them must be specifically authorized in writing by:

- a) the owner of the equipment; and
- b) the *Responsible Executive*, or the *Administrative Head of Unit* responsible for the engagement of the *Designated Professional*.

5.2. No Weight Restriction: *Tools of the Trade* are not counted as part of a weight allowance for *Household and Personal Effects* in the *Rates Table* even if moved as part of *Household and Personal Effects*.

5.3. Scientific Tools: *Tools of the Trade* composed of scientific equipment or supplies that are:

5.3.1. shipped within Canada must be accompanied by:

- a) certification that *UBC* may require to assure safety (this may include that the equipment is free of detectable contamination by chemicals, radioactivity, or bio-hazards); and
- b) a list that clearly identifies each item of equipment.

5.3.2. being imported into Canada may be required to be shipped separately from the *Household and Personal Effects* and be accompanied by:

- a) certification that may be required to cross the border and to satisfy *UBC* of safety (this may include that the equipment is free of detectable contamination by chemicals, radioactivity, or bio-hazards); and
- b) a list that identifies:
 - i) each item of equipment;

- ii) the country of manufacture; and
- iii) the fair market value.

5.4. Tax or Duties: *UBC* will not pay any importation or excise taxes or duties on *Tools of the Trade* that are imported into Canada unless:

- a) approved on a case-by-case basis by the *Responsible Executive*, or the *Administrative Head of Unit* responsible for the engagement of the *Designated Professional*; and
- b) those specific *Tools of the Trade* will become the property of *UBC* (and for which income tax receipts may be given to the donor where permitted):
 - i) upon delivery into *UBC*'s possession in Canada or *UBC* assuming risk for the damage or destruction of the goods, whichever comes first; or
 - ii) as agreed between:
 1. the owner of the equipment; and
 2. the *Responsible Executive*, or the *Administrative Head of Unit* responsible for the engagement of the *Designated Professional*.

6. Rates Table –Maximums Per Move

| Subject of Rate | Maximum Expenses /Rates |
|---|--|
| a. Automobile transport | <p>Only expenses for personal passenger car, van or truck (up to ½ ton pickups) will be permitted. The rates are as follows:</p> <p>Shipping:</p> <ul style="list-style-type: none"> ▪ <500km – \$0 ▪ 500km or greater = by rail or truck only at market rates not to exceed \$2500 using the most appropriate service <p>Driven:</p> <ul style="list-style-type: none"> ▪ Rates as apply under Policy #83 <i>Travel and Related Expenses</i> but not to exceed \$2500 |
| b. <i>Dependant Care Allowance</i> | Only if authorized and then for no more than \$25 per day per <i>Dependant</i> . |
| c. Customs and immigration related expenses | Provided <i>UBC</i> incurs the expense or specifically authorizes the expenditure in advance, which may include designating the service provider, <i>UBC</i> will pay for the listed expenses of the <i>Designated Professional</i> , <i>Spouse</i> , and <i>Dependants</i> to a cumulative maximum of \$3,000 incurred within 3 years of the |

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| | <p>acceptance of the offer of employment:</p> <ul style="list-style-type: none"> ▪ Translation of documents where translation is required by <i>UBC</i> and/or the Canadian government ▪ Medical examinations required by <i>UBC</i> and/or the Canadian government ▪ Immigration, work permit, and residency visa fees levied by the Canadian government ▪ Police criminal records checks and fingerprinting ▪ Healthcare insurance premiums of the family or person to be covered for up to 3 month immediately preceding that person's eligibility for coverage by the British Columbia Medical Services Plan. <p><i>UBC</i> does not pay for:</p> <ul style="list-style-type: none"> ▪ Emigration or border fees levied by foreign governments ▪ Passports ▪ Legal services or documents |
| d. <i>Household and Personal Effects-storage</i> | The maximum storage expenses for <i>Household and Personal Effects</i> is one month's storage, if required, and one-time delivery into or out of the storage facility. |
| e. <i>Household and Personal Effects – weight allowance</i> | The maximum weight covered for <i>Household and Personal Effects</i> is as set out in the following table: |

| <i>Household and Personal Effects Weight Allowance Table</i> | |
|--|--|
| Number of People in Move | <i>Weight Allowance</i> |
| <i>Designated Professional</i> alone | 2724 kg (6,000 pounds) |
| <i>Designated Professional</i> accompanied by <i>Dependant(s)</i> | 2724 kg (6,000 pounds), plus 455 kg (1,000 pounds) per <i>Dependant</i> |
| <i>Designated Professional & Spouse</i> | 4550 kg (10,000 pounds) |
| <i>Designated Professional & Spouse</i> accompanied by <i>Dependant(s)</i> | 4550 kg (10,000 pounds), plus 455 kg (1,000 pounds) per <i>Dependant</i> |

7. Central and Unit Funding

- 7.1.** The Vice-President, Administration and Finance shall establish a central account to fund payments under the Policy to administrative units and may designate limits or allocations of funds within that account.
- 7.2.** Where the salary of the *Designated Professional* is to be paid from a grant or source other than the UBC's general purpose operating fund (GPOF), expenses under the Policy for that person shall be first paid from that grant or other source to the extent permitted by the funding source before seeking payment from UBC. Reimbursement from the central account shall be in an amount which is the lesser of the shortfall or the amount due under the *Central Fund Contribution Table* in these Procedures.
- 7.3.** Administrative units may seek reimbursement for expenses under this Policy from the central account up to the limits established under the Policy, and shall draw funds from its own budget for the remainder. A request for reimbursement shall:
- 7.3.1. identify whether other sources of funds are available for the expenditures and the amounts drawn upon (or to be drawn upon); and
 - 7.3.2. include an undertaking to update the statement if additional expenditures or other sources of funds are received which increase or decrease the reimbursement entitlement by \$1,000 or more.
- 7.4.** Regardless of source of funding, the administrative unit responsible for the hiring or transfer of the *Designated Professional* shall report to UBC Payroll the amounts of all payments made on behalf of the *Designated Professional* under this Policy for benefits/allowances that are taxable under Canada Revenue Agency rules, for tax reporting purposes. The Income Tax Act requires that certain employer-paid benefits/allowances that are paid to employees be included in the employee's income for tax purposes. With respect to relocation, some examples of taxable benefits are housing reimbursement upon relocation, customs expenses, and immigration expenses. Additional information may be obtained from Financial Services <http://finance.ubc.ca/payroll/administrative-procedures/submitting-taxable-benefits>.

8. Central Fund Contribution to Unit Relocation Expenses

- 8.1.** The Vice-President, Human Resources, or designate, shall administer a central account to reimburse administrative units for relocation expenses incurred by the unit under the Policy for each move (including expenses under Policy #83 *Travel and Related Expenses*) based on the corresponding family size and move point criteria in the table below:

| Central Fund Contribution Table | | | | |
|---|---|--|----------------------------------|--|
| Number of People in Move | Reimbursement to Unit for Relocations Originating: | | Travel Expenses Allowance | Tax and Financial Advising Services Allowance |
| | within Canada | outside Canada | | |
| <i>Designated Professional alone</i> | \$7,000 | \$8,000 | \$1,500 | \$1,000 |
| <i>Designated Professional accompanied by Dependant(s)</i> | \$7,000 plus \$500 per <i>Dependant</i> | \$8,000 plus \$1,000 per <i>Dependant</i> | \$1,500 | \$1,000 |
| <i>Designated Professional & Spouse</i> | \$9,000 | \$10,000 | \$1,500 | \$1,000 |
| <i>Designated Professional & Spouse accompanied by Dependant(s)</i> | \$9,000 plus \$500 per <i>Dependant</i> | \$10,000 plus \$1,000 per <i>Dependant</i> | \$1,500 | \$1,000 |

8.2. The table above may be amended, from time to time, by the Vice-President, Human Resources, personally (not delegated), effective upon the posting of the updated Procedures.

Schedule to Procedures
of
Definitions and Other Interpretation Rules

Definitions

In the Procedures to Policy 82 *Relocation of Faculty Members and Senior Management Staff* the following terms have the meaning defined below:

- a. **“Allowed Moving Expenses”** means the following moving expenses up to the maximum applicable amount specified in the *Rates Table*:
- 1) Packing, loading, delivery and unloading excluding disassembly or assembly as follows: (e.g. for satellite dishes, scientific equipment, computer networks, ready-to-assemble furniture, and swings or playground sets):
 - a. Any disassembly requiring tools, special knowledge, or involving fluids; and
 - b. Any assembly.
 - 2) Storage and delivery from storage; and
 - 3) En route insurance of:
 - a. *Household and Personal Effects* up to replacement value;
 - b. *Tools of the Trade* up to replacement value.

The term “Allowed Moving Expenses” excludes:

- Expenses not permitted or covered by this Policy
 - Servicing of appliances, furnishings, or equipment
 - House cleaning or repair
 - Utility service commencement fees (commonly called “connection” or “hookup” fees)
- b. **“Dependant Care Allowance”** means an allowance for childcare or elder care of a *Dependant* payable to a caregiver normally compensated for their services up to the maximum applicable amount specified in the *Rates Table*.
- c. **“Household and Personal Effects”** means those possessions of the *Designated Professional, Spouse, and Dependents*, which are necessary to re-establish the *Designated Professional’s* household including stored items. These effects include domestic household pets, if permitted by law, excluding fish and birds. These effects do not include:
- Building or landscaping materials of any kind (e.g. lumber, cement, bricks, patio slate, sand, gravel)
 - Automobiles, construction equipment, farm equipment, tractors

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- Recreational vehicles (e.g. trailers, campers, and motorhomes) other than those the mover will transport as part of the *Designated Professional's* possessions without extra charge [N.B. Within Canada snowmobiles and all terrain vehicles might be transportable without extra charge if prepared by the *Designated Professional* as required by the mover - such as by removing volatiles.]
 - Firewood, railroad ties
 - Perishables, including frozen foods and liquids subject to freezing
 - Swimming pools
 - Outbuildings, storage sheds or greenhouses
 - Items that cannot be shipped due to safety or regulatory restrictions including:
 - Paints, cleaning solvents, aerosols or flammables including matches, lighter fluid, gasoline, cleaning fluids, fertilizers
 - Unregistered firearms
 - Ammunition and explosives
 - Propane tanks, empty or full
 - Wine and liquor
 - Livestock, fish, and birds
 - Plants or soil in international shipments
- d. **“Meal Allowances”** means the meal allowances as set under the *UBC Policy #83 Travel and Related Expenses* [N.B. this excludes meals provided by others e.g., complimentary hotel breakfast].
- e. **“Rates Table”** means the table in these Procedures indicating the maximum rates payable under the Policy for identified items or matters.
- f. **“Travel Allowance”** means the reimbursement or rates applicable under the *UBC Policy #83 Travel and Related Expenses* for travel by common carrier (air or ground), or private vehicle between the *Designated Professional's* home or office and the new workplace designated by *UBC*.