Relocation and Moving Policy

Title: Relocation and Moving Policy

Policy Owner: Office of the Provost / Department of Human Resources

Applies to: Designated Full-time Faculty, Athletics, Librarians, Management Exempt, and Management Exempt positions with faculty titles

Campus Applicability: All Campuses except UConn Health

Effective Date: February 25, 2021

For More Information, Contact: Office of the Provost or Human Resources

Contact Information: Provost@uconn.edu / HR@uconn.edu

Official Website: http://www.policy.uconn.edu

REASON FOR POLICY

The University recognizes the competitive nature of the hiring process and therefore grants the flexibility to reimburse or pay for actual relocation expenses for designated full-time faculty, athletics, management-exempt administrators.

POLICY STATEMENT

The relocation policy and procedures establishes the nature of expenses that can be direct billed or reimbursed from the University, limits on these expenses, and a timeframe of when these expenses can occur.

POLICY

1. In the offer of employment, the University may include an offer to reimburse and/or provide direct payment for allowable moving expenses required for relocation up to the amount specified in the table set forth in paragraph 15 herein.

2. All reimbursement or direct payments for relocation expenses are includable in the employee’s taxable wages.

3. Designated faculty includes tenured and tenure-track faculty, management-exempt employees with a base faculty appointment, in-residence faculty, clinical faculty, extension faculty, and librarians.

4. Direct billing cannot be used for moves that occur during November or December.
5. The hiring process includes three phases: interview, offer and acceptance, and move. The final phase, the move, begins the date of the final one-way trip of the selected candidate and their family to their new residence. The move phase ends upon the day of arrival. Only expenses incurred in connection with the move phase are covered by this policy. Common relocation expenses include (where relevant, this covers the employee and one immediate family member, defined as spouse or child):

- Transportation of household goods
- Airfare, in accordance with the University Travel Policy
- Car rental (through the day of arrival), or mileage at the standard IRS medical/moving mileage rate, in accordance with the University Travel Policy
- Lodging (only during the one-way trip of the move phase, ending on the day of arrival), in accordance with the University Travel Policy
- Meals during travel (excluding alcohol), in accordance with the University Travel Policy
- Shipping of car
- Storage of household goods after arrival; not to exceed 30 consecutive days after date goods are moved from the former residence

6. Employees will be reimbursed for the shortest, most direct route available. Travel incurred for side trips or vacations en route, etc. may proportionally reduce the amount of moving expenses an employee is eligible to receive.

7. The following types of non-business expenses, included but not limited to, will not be paid or reimbursed as part of relocation expenses:

- Entertainment
- Side trips, sightseeing
- Violations (parking tickets, moving violations, )
- Return trips to former residence
- Expenses related to former residence
- General repairs or maintenance of vehicle resulting from self-move
- Temporary accommodation in the new location beyond the day of arrival

8. Individuals should refer to the Reimbursement of Recruitment Expenses Policy for guidance regarding appropriate payment or reimbursement of expenses related to the “interview” and “offer and acceptance” phases. Relocation payments are not intended to cover any travel expenses incurred during these two earlier phases.

9. The cost associated with the relocation of a laboratory, professional library, scholarly collection and/or equipment (scientific, musical, etc.) are excluded from this policy as they are not considered household goods or personal effects. If relevant for business purposes, costs associated with moving such materials should be negotiated separately.

10. This policy applies to new employees whose move exceeds 50 miles and who are moving to within 35 miles of the primary campus at which they will be working. Exceptions to this rule may be made by a Dean, the Director of Athletics, or by the appropriate EVP if a) they think that a move is reasonable given the commuting distance that the new employee would be facing, or b) the new residence of the employee will be close enough to the primary campus at which they will be working so that they will reasonably be able to relocate there and perform their duties.

11. Relocation expenses will only be covered by this policy if they occur within 12 months of the new start date of an employee.

12. If employment with the University ends in a voluntary separation prior to working at least thirty-nine (39) weeks on a full-time basis in the first twelve months after starting employment, the employee must reimburse the University the full amount of relocation expenses paid by the University.

13. Exceptions to extend applicability beyond these employees require a business justification and must be explicitly approved by the Director of Athletics, EVP, or President as appropriate.
14. The President will recommend an amount for reimbursement and/or direct payment for the Executive Vice Presidents/Provost to the Board. The Chairman of the Board will recommend an amount for reimbursement and/or direct payment for the President to the Board.

15. The formula for determining the amount to be reimbursed is based on the distance of the move. This figure represents the maximum reimbursement allowed. The allowance for a move constitutes the maximum commitment for reimbursement of University and/or Foundation funds, rather than an entitlement of the employee. The figure is also the maximum amount the University will pay when the direct bill option is selected. The formula is calculated according to the distance of the move, as follows:

<table>
<thead>
<tr>
<th>Mileage</th>
<th>Reimbursement of expenses up to:</th>
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<tr>
<td>≤ 1,000 miles</td>
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16. It may be the case that the competitive hiring practices of a specific field require exceptions to this policy. Exceptions that involve costs of up to 200% of the standard formula may be approved by the Dean, Director of Athletics, or EVP as appropriate. Exceptions above 200% of the standard formula or involving other requirements of the policy will require documentation of the business justification for the requested exception and these require approval by the EVP or President as appropriate.

PROCEDURES

As of April 2021, the procedures for moving and relocation requests are under revision. Departments are advised to follow the procedures below and contact provostl@uconn.edu with any questions.

Upon offer acceptance, the candidate’s department will sign and forward a written ME-13 request for moving expenses form to the appropriate signatories for approval. The candidate may then proceed with planning their move by either direct payment by the University via Consumer Relocation Services or seek reimbursement for out of pocket expenses through the department.

ENFORCEMENT

Violations of this policy or associated procedures may result in appropriate disciplinary measures in accordance with University By-Laws, General Rules of Conduct for All University Employees, applicable collective bargaining agreements, the University of Connecticut Student Code, or other applicable University Policies.

RELATED POLICIES

Reimbursement of Recruitment Expenses, Policy on

POLICY HISTORY

Policy Created: 07/01/2003 (Reimbursement of Recruitment and Moving Expenses Policy approved by Board of Trustees)
Revisions:

08/07/2013 (Reimbursement of Moving Expenses Policy and Procedures approved by Board of Trustees)
11/21/2014 (Procedural revisions to Reimbursement of Moving Expenses Policy and Procedures)
02/24/2021 (Relocation and Moving Policy approved by Board of Trustees)

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