**7-ADMIN-4 Guidelines for Relocation Allowances for New Full-time Employees**

Responsible Division/Office: Office of Human Resources

Responsible Officer: Chief Human Resources Officer

Revision History: 2023

Effective Date: April 2024

Next Review: 2028

1. **Summary.** These guidelines are established in accordance with university policy 3356-7-54 and provide guidance for relocation expenses/allowances consistent with university needs, sound business practices and budgetary limitations in accordance with applicable laws and regulations. Relocation payments are intended as a tool for recruiting talented faculty and staff to the University. Relocation payments should not be offered arbitrarily but rather should be aligned with university business needs.
2. **Relocation Payment Definition.** Payment of reasonable expenses resulting from the moving of household goods and/or personal effects of an approved newly hired, faculty or professional administrative staff member in a qualifying position.
3. **Purpose.** To outline conditions under which the payment of moving and/or relocation expenses of newly hired faculty and professional administrative staff may be authorized.
4. **Parameters.**
   1. **Eligibility.** 
      1. Full-time faculty and professional administrative staff, including athletic coaches are eligible for relocation allowances regardless of the dollar amount or source of funding.
      2. In order to be eligible for a relocation allowance, the distance between the employee’s old home and the university’s campus must be at least fifty (50) miles.
      3. All employees receiving a relocation allowance or related form of payment are required to sign the university’s standard relocation expense repayment agreement.
      4. In order to be eligible, employees must relocate their household within three (3) months of the effective date of their initial appointment with the University and provide notification of their new address to the Office of Human Resources.
   2. **General Procedures.** 
      1. All relocation allowances must be negotiated at the time a position is offered, circulated through the electronic hiring proposal process, approved by the hiring manager and by human resources, and included in the offer letter or appointment form prepared by the university’s human resources office.
      2. The standard relocation allowance will not exceed one-thousand dollars ($1000.00).
      3. In certain circumstances with the approval of the Chief Human Resources Officer and the Vice president for Finance and Business Operations, an employee may receive a relocation allowance that is greater than the standard amount. In such cases, payment should not exceed the employee’s one-month base salary.
      4. An approved relocation allowance will be processed as a one-time lump sum payment and included with the employee’s regular semi-monthly paycheck.
      5. Additional payment by the University for hotel or other temporary accommodations should not be made outside of these guidelines. If an employee is offered a temporary stay in university-provided housing, prior approval is required by the Chief Human Resources Officer and the Vice President for Finance and Business Operations and will be included on the hiring proposal and in the offer letter and/or appointment form prepared by human resources.
      6. In unique circumstances with prior approval of the Chief Human Resources Officer and the Vice president for Finance and Business Operations, the university may pay a vendor or reimburse an employee for the movement of personal belongings. Prior approval is required, and applicable procurement services procedures must be followed. Payment of moving expenses must also be included in the offer or appointment letter issued by Human Resources.
   3. **Eligible Expenses.**
      1. Moving expenses for household goods, furniture, clothing, appliances, books, and other personal property related to the individuals' profession.
      2. Charges for packing, insurance, disconnecting and connecting appliances.
      3. Reasonable in-transit lodging expenses, parking fees, tolls, and the university’s standard mileage rate for one trip to the new residence.
   4. **Ineligible Expenses.** Certain expenses are not eligible for payment or reimbursement unless specifically negotiated between the hiring manager and the employee and approved by human resources. Ineligible expenses include but are not limited to:
      1. Expenses classified as non-reimbursable under the Ohio Administrative Code regarding travel regulations (in-state and out-of-state).
      2. Cost of meals while traveling from prior residence to new residence.
      3. Pre-move house-hunting expenses.
      4. Real estate expenses, including selling or settling a lease on the prior residence and buying or acquiring a lease on a new residence.
      5. Storage charges, including in-transit storage and handling charges.
      6. Expedited moving charges.
      7. Commercial transportation of animals or pets.
      8. Commercial transportation of automobiles, boats, or trailers.
      9. Moving of storage sheds and building materials.
      10. Moving property pertaining to a commercial enterprise in which the individual or members of the newly hired employee's family are engaged.
      11. Maid service.
      12. Alterations to furnishings.
      13. Lease or mortgage cancellation fees.
      14. Unused tuition expenses.
      15. Cancelled club memberships.
      16. Moving of Recreational vehicles,
   5. **Payments.**
      1. Payments and/or reimbursements made in accordance with this policy are subject to state, local, and federal tax regulations and will be reported as taxable income and/or as a taxable fringe benefit on the employee’s IRS form W-2.
      2. All relocation expenses/allowances will be charged-back to the hiring department’s budget and are subject to the availability of funds.
      3. Although expenses may occur prior to the employee’s start date, relocation payments will not be made until after the employee begins employment with the University.
   6. **Repayment.**
      1. Employees receiving payment of relocation expenses/allowances will be required to sign the Relocation Expense/Allowance Repayment Agreement form prior to receiving payment. A copy of the signed form will be provided to the employee.
      2. An employee who voluntarily separates from the university prior to completing 2 years of continuous service or is terminated for cause is required to pay back the relocation expenses/allowance as follows:

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| --- | --- |
| **Days Employed** | **Repayment** |
| 0 - 365 | 100 % |
| 366 - 485 | 75 % |
| 486 - 605 | 50 % |
| 606 - 730 | 25 % |

* 1. **Exceptions.** Any exceptions to these guidelines must be approved in writing by the Chief Human Resources Officer and by the Vice President for Finance & Business Operations and must be supported by university business necessity.