

U of C Staff Relocation Policy

This policy applies to Fulltime Faculty or Staff (GFT) only.

Eligibility

Persons granted 'continuing', 'contingent', or 'full-time limited term' (teaching or non-teaching) Board appointments (as defined in the Procedures Pertaining to Appointment, Promotion and Dismissal (Academic Staff) may be eligible for a relocation allowance towards expenses necessarily and reasonably incurred in relocating to Calgary. **Academic staff members eligible to receive a relocation allowance will be so advised in the President's offer of appointment letter.**

Relocation allowances are made available to new appointees to assist in meeting the costs associated with the physical removal of themselves, their spouse, and dependent children from their place of domicile at the time of the appointment to the University. The reference to domicile in these regulations means the appointee's permanent residence, and unless otherwise specified in the President's offer of appointment letter, shall be understood to be the place to which such letter is addressed. It should be noted that only those costs related to travel and shipment of household furnishing and personal effects, which originate from the appointee's domicile, as defined above, will be considered in determining the amount of relocation allowance entitlement.

Relocation allowances are not intended to cover a variety of sundry items arising from the move such as , commissions on the sale or purchase of property, duty on articles brought into Canada, rentals, house hunting, babysitters, loss on sale of assets, and other expenses not directly related to the physical removal.

An appointee's entitlement to a relocation allowance shall not be reduced by reason of his/her entitlement to receive a relocation allowance or relocation grant on termination of their present employment; however, in no case will the University pay an allowance, which in combination with assistance from any other source, represents reimbursement beyond the total of actual expenses incurred.

Designated Van Line

The designated moving company for the University is St George Moving and Storage.

Upon notification of the appointment, the University will advise the St George Moving and Storage representative directly. The appointed van line representative will then contact the appointee to arrange a convenient time to complete an estimate of the weight and cost of goods to be transported. Only this one estimate is required.

At the time of the estimate, the appointee can assist the representative by pointing out any unusual or valued belongings that may require special handling. The van line representative will provide printed material outlining items that cannot be moved, as governed by Transport Canada rules. It is important that the appointee deal directly with the van line representative to coordinate:

- packing, loading and delivery dates
- storage requirements

- delivery destination address
- special requirements.

The University will pay the van line directly for the costs associated with transporting personal effects up to the maximums outlined in the Weight Allowance guidelines. Amounts exceeding these allowances will be charged directly and are payable by the appointee to the van line company upon delivery. Excess weight will be charged at the same rate as to the University. The appointee may wish to consider whether the cost of moving an item exceeds the value of the item itself.

Once the estimate has been completed by the van line representative, it will be forwarded to the **General Accountant, Financial Services, The University of Calgary, Fax Number 403-282-2974**

Shipment of Household Goods and Laboratory Equipment

Although the University Relocation Policy allows for the shipment of most household goods and laboratory equipment there are certain items not eligible for reimbursement. The following lists indicate which items are allowable and which are not.

Allowable services covered by the University Guidelines are:

- Packing, loading, delivery and unloading of personal and household effects
- Appliance services
- Light house cleaning at origin
- One month's storage, if required
- En route insurance (Replacement Value Protection)
- Transportation of personal vehicle, provided the total weight of personal goods and vehicle falls within the weight allowance permitted (shipping from the United States to Canada is by vehicle weight; shipping within Canada is the cost per kilometre)
- Transportation of lawn mowers, snow blowers, motorcycles

Swings and playground sets provided dismantling and reassembly are done by the appointee.

Services not covered by the University Guidelines are:

- Building materials such as lumber, cement, bricks, patio slate, sand, gravel, etc.
- Construction equipment, farm equipment, tractors
- Recreational vehicles such as trailers, campers, motorhomes, etc.
- Firewood, railroad ties
- Paints, cleaning solvents, aerosols or flammables including matches, lighter fluid, gasoline, cleaning fluids, fertilizers **(Can not be shipped at all due to Transport Canada Regulations)**
- Ammunition and explosives (only registered firearms can be transported)
- Propane tanks, empty or full **(Can not be shipped at all due to Transport Canada Regulations)**
- Wine and liquor **(Can not be shipped due to liquor regulations)**
- Perishables, including frozen foods and liquids subject to freezing
- Livestock, fish, birds **(Can not be shipped due to regulations)**
- Servicing of waterbeds (emptying and/or filling). Arrangements can be made with the van line company for this service and is payable to directly the van line company by the appointee
- Swimming pools
- Outbuildings, storage sheds or greenhouses

Some of the above items can be shipped by the van line company but these items will be charged directly and are payable by the appointee to the van line company upon delivery. The rates charged will be the same as the rates charged to the University.

The van line does not ship or insure the following goods, however the van line company will assist the appointee in arranging special transport for:

- Jewellery, precious stones
- Money in any form; cash, securities, bonds, notes
- Collections (stamps, coin and articles of similar high value)
- Fur coats
- Legal documents
- Photographs and valuable works of art

Weight Allowances

Appointee - 2724 kg (6,000 pounds)

Appointee accompanied by dependent children - 2724 kg (6,000 pounds), plus 455 kg (1000 pounds) for each dependent child accompanying the appointee

Appointee not accompanied by partner - 2724 kg (6,000 pounds)

Appointee not accompanied by partner but accompanied by dependent children -2724 kg (6,000 pounds), plus 455 kg (1,000 pounds) for each dependent child accompanying appointee

Appointee accompanied by partner - 4550 kg (10,000 pounds)

Appointee accompanied by partner and dependent children - 4550 kg (10,000 pounds), plus 455 kg (1,000 pounds) for each dependent child

Both partners appointed to academic staff - may at their option submit a joint claim for relocation expenses and claim an aggregate weight allowance of 5448 kg. (12,000 pounds), plus 455 kg (1,000 pounds) for each dependent child that will accompany the appointees

Where necessary, freight charges based on cubic measure will be converted $1\text{m}^3=160\text{kg}$.

If there are concerns about exceeding the University's weight allowances or if there are any questions concerning the estimate or interpretations of these regulations contact:

[General Accountant, Financial Services](#)

Phone: (403) 220-5708

Fax: (403) 282-2974

Packing, Loading, Delivery

Normally packing, loading and unloading will all be completed on a weekday. The household effects will be packed on one day and loaded on the van the following day. It is important that the appointee or another responsible adult be present during the packing and loading process.

Once all the goods have been loaded on the van a complete inventory sheet itemizing all goods packed for transport will be presented to the appointee. An estimated delivery date time frame will be indicated on the inventory sheets based on transit guidelines, unless the goods are

going into storage. This time frame confirms the guaranteed arrival schedule for the van line. The van line is responsible for covering costs associated with hotel and meal expenses caused by their delayed arrival, based on contract guidelines.

It is the appointee's responsibility to provide the driver with a contact telephone number in Calgary. This is an important number. The van line representative will call this number 24 hours prior to delivery to confirm all details.

When the goods are unloaded, please ensure that a responsible adult is present to confirm and accept receipt. If there is any damage on the exterior of the boxes, bring it to the attention of the driver, initial the inventory sheet and ensure the van line driver initials it as well. This will save problems in the event of a future claim.

Appliance Service

The intent of the appliance section is to provide for the disconnecting, preparing for shipment and reconnecting of appliances but not for structural or plumbing changes in the new home or modifications thereof. The van line will arrange for the authorized services and include the charges on the invoice to the University.

The University will assume the normal cost of service for disconnecting, moving and reconnecting existing appliances.

Included are:

- Refrigerators, including those with icemakers and/or cold water dispensers
- Freezers
- Washing machines/dryers
- Stoves, dishwashers
- Stereo equipment
- Entertainment centres

Not included are:

- Disconnecting, moving and reconnecting built-in appliances
- Cost of rewiring of home, or modifying voltage
- Bringing in of gas lines or other energy lines
- Installing plumbing
- Modification of dwelling to install venting of appliances
- Satellite dishes take down and/or setup

Cleaning

Light house cleaning at the point of origin, up to a maximum of \$75.00 is covered by the University. This service is coordinated by the appointee with the van line representative. The van line representative will arrange for the service and include the charges in the invoice to the University.

Light house cleaning is defined as cleaning up spots left behind by heavy furniture and appliances as well as any debris left behind by the movers. It is not intended to cover general household cleaning such as windows, ovens, fridges, etc. Any other cleaning expenses are paid by the appointee.

The appointee may use a personal cleaning service rather than the van line service. The University will reimburse the appointee upon submission of a receipted relocation claim (maximum of \$75.00).

Storage

Storage of household goods will be covered up to a maximum of 30 days. One time costs associated with delivery into and out of the storage facility are also covered by the University. Storage requirements beyond 30 days will be billed directly to the appointee based on the University's corporate rate with the van line. Individuals requiring storage beyond 30 days may obtain quotes for these costs directly from the van line representative.

It is important to note that costs associated with access to the goods while they are in storage will be at the appointee's expense. To avoid storage access charges, it is recommended that a person consider such things as seasonal changes that may require a change of clothing, school requirements for children etc.

Insurance

Full replacement value insurance is in effect during the course of the move while the belongings are handled by the van line, including while in transit and in storage. Excluded are the specific valuables identified under "**Services not covered by the University Guidelines**" on page 3.

In the event of damage or loss, the appointee has 60 days from delivery date to file a claim with the van line. It is important that the appointee check all personal effects transported within this 60 day time frame. Claims submitted beyond 60 days will **NOT** be accepted by the van line. Most claims are minor and can be settled quickly. Whenever possible, the item will be repaired rather than replaced. The van line company will attempt to settle claims within 30 days upon receipt of the form. If there is some difficulty with a claim, please contact the van line customer relocations department.

Laboratory Equipment

Laboratory equipment approved for acceptance by The University of Calgary may be moved under these relocation guidelines. The lab equipment will ordinarily become the property of The University of Calgary.

The appointee must provide the following documentation to the van line company:

- Certification that the equipment is free of all detectable chemical, radioactive and/or bio-hazardous contamination (whether moved within Canada or imported into Canada)
- Equipment that will be brought into Canada or moved within Canada by the appointee for use at The University of Calgary **must have written authorization from both the appointee's institution and The University of Calgary (Dean and/ or Department Head)**
- The approved equipment that is being **imported into Canada, must be shipped separately from the personal household effects and a detailed listing of the equipment must be provided.** This listing will clearly identify each item with a complete description, 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. Approved equipment being shipped within Canada can be shipped together with the personal

household effects provided a detailed listing of the equipment is provided as described above.

The van line company will then provide copies of the above documentation to the **General Accountant, Financial Services, The University of Calgary, FAX # (403)282-2974**. This documentation will be forwarded to the Traffic Section of the Materials Management Department for proper customs clearance.

The following regulations apply to **laboratory equipment that has NOT been approved by The University of Calgary**:

- Equipment brought into Canada or shipped within Canada by the appointee, which has not been approved by The University of Calgary, is the personal responsibility of the appointee (i.e. applicable duties, taxes, freight). The University of Calgary will accept no responsibility for such shipments.

Posting of a bond or a guarantee for duty and taxes with Canada Customs is strictly a personal matter between the individual and Canada Customs. The University of Calgary will not sign any letter of undertaking to guarantee duty and taxes under any circumstances.

Travel and other Relocation Expenses

The University will reimburse the appointee for the following items upon submission of original receipts on a University of Calgary Relocation Claim form (see Reimbursement Process).

Shipping Personal Vehicles

The costs related to the shipment of motor vehicles are normally not eligible for reimbursement unless the vehicle is shipped as part of the normal weight allowance by the van line. However, if there are extenuating circumstances, reimbursement for the shipment of one automobile, may be allowed to a maximum rate of 20¢ per kilometre by the most direct route but not to exceed the actual cost of transportation. **The application of this regulation requires advance approval from the General Accountant, Financial Services, The University of Calgary 403-220-5708.** The cost of shipping a second motor vehicle is not allowed. Motor vehicles imported into Canada must meet Canadian emission standards.

Pets

The actual transportation costs of two pets (dogs and/or cats only) by the most economical and practical route will be covered by the University when supported by proper documentation. All such arrangements are the responsibility of the appointee. The other associated costs for shots, cages, boarding, quarantine expenses, etc., are the responsibility of the new appointee. No other pet transportation costs will be covered under the University relocation policy.

Legal Expenses

The University will reimburse the appointee 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, 000.00. These expenses must be incurred and submitted within two years of the date of appointment in order to be eligible for reimbursement.

Advance Shopping by Air Freight, Mail Express or Common Carrier

Personal effects required prior to the move may be shipped by the most economical method and are subject to the allowable weight allowance. The van line company can arrange for the shipping of these goods at a reduced rate. The initial charge is considered the responsibility of the appointee. Reimbursement to the appointee will be upon submission of a properly receipted relocation claim. Receipts must show the weight or cubic metres of the goods shipped.

Laboratory equipment (approved by the University of Calgary) required prior to the move may be shipped by the most economical method and is subject to the same guidelines as described in the Laboratory Equipment section. Laboratory equipment that has not been approved by the University will be considered the personal responsibility of the appointee. The van line company can arrange for the shipping of these goods at a reduced rate.

Travel Expenses

The University will reimburse for public transportation costs to a maximum of economy air fare by the most direct route, for each member of the family when supported by fare receipts. Taxi fare to the airport and from the airport in Calgary will be reimbursed when supported by receipts.

When the appointee's private motor vehicle is used for transportation in lieu of or in combination with public conveyances, an allowance of 22¢ per kilometre by the most direct route, plus lodging and meals (supported by receipts) en route for a reasonable number of driving days will be reimbursed. Where 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 11¢ will be reimbursed.

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

Utility Connections

Utility connection fees will be reimbursed to the appointee by the University upon submitting receipts with a relocation claim form. Normally these would include water/sewer, electrical, telephone and cable television. This allowance is not intended to cover deposits. Any deposits are returned to the appointee after a period of time by the utility company.

Immigration Fees

Canada Immigration charges for services such as right of landing fees are reimbursable up to a maximum of \$3,000 per family (appointee, partner and dependent children). Claims may be made by submitting the original receipts with a relocation claim form.

Reimbursement Process

The cost of shipping personal and household effects and authorized laboratory equipment are paid directly to St George Moving and Storage by the University. All other allowable expenses incurred as referred to in this policy, will be paid to the appointee when submitted on a **relocation claim** and supported by the appropriate receipts.

The expenses that will be reimbursed are as follows:

- Personal cleaning service to the maximum of \$75.00 not included on van line invoice.
- Transportation of two pets (dogs and cats only)
- Legal expenses relating to selling and/or purchasing a principal residence to a maximum of \$1,000.00
- Shipment of a vehicle in extenuating circumstances (special approvals required)
- Shipping by air freight, mail express or common carrier as per guidelines
- Travel by air and taxi expense to and from airport
- Travel by private motor vehicle plus lodging and meals en route to Calgary
- Lodging and meals upon arrival in Calgary to a maximum of three days
- Utility connections

Upon arrival at the University, a travel advance may be requested from the General Accountant, Financial Services phone 220-5708 to assist with expenses incurred until a relocation expense claim can be submitted. A relocation expense report available through the PeopleSoft Expense module should be completed by the new appointee and submitted to Materials Management, Accounts Payable (220-5708).

Resignation Before Completing Contract

A person granted a Board appointment who voluntarily leaves the service of the University either by resigning or not accepting reappointment if offered, will be required to refund a portion of the relocation allowance on the following basis:

Moves From Within Canada: each month of regular service (exclusive of unpaid leave periods) shall be considered as discharging 1/24th of the obligation.

Moves From Outside Canada: each month of regular service (exclusive of unpaid leave periods) shall be considered as discharging 1/36th of the obligation.

Where a refund of the relocation allowance is required, the amount will be deducted from the appointee's salary or from any other amounts due and owing to the appointee, if no other repayment arrangements have been made by the appointee.