

Policy on Relocation Expenses for New Full-Time Faculty Appointees

Approved by the President and Vice-Chancellor - December 17, 2003

DISCLAIMER: If there is a discrepancy between this electronic policy and the written copy held by the Policy owner, the written copy prevails.

POLICY ON RELOCATION EXPENSES

This policy applies to faculty appointed on the basis of tenure track or contractually limited periods of two years or more.

Moving Expenses:

It is the policy of McMaster University to pay the standard charges for the moving of personal household effects to a maximum of \$3,000. Standard charges do not include automobiles or hooking up electrical equipment. Storage charges are limited to one month and must only include items of personal and household effects. Under certain conditions, the \$3,000 maximum may be increased. Any such requests for additional funding must be negotiated with and is the responsibility of the appropriate Faculty Dean's Office or the Academic Department.

McMaster University maintains a service agreement with a single moving company. New appointees may link to the moving company's website by visiting <http://www.mcmaster.ca/purchase> and click on Supplier Information and then Preferred Suppliers. An information sheet containing contact information on how to start the moving process will also be included along with the new appointee's employment package.

Should a new appointee wish to arrange their own move, they must obtain estimates from at least two moving companies. Normally, the lowest estimate is accepted. These estimates are to be submitted to the appropriate Faculty Dean's Office or Academic Department upon submission of their relocation receipts.

Travel Expenses:

In addition to the moving expenses, McMaster University will also pay travel expenses for the new appointee, his/her spouse and dependent children, to a maximum of economy airfare by the most direct route from their place of residence to the Hamilton vicinity. In order to qualify for this reimbursement, original receipts are necessary for all travel expenses incurred. Expenses which may also be reimbursed under this policy include:

either

- a. in accordance with the McMaster University Corporate Travel Policy, the cost of meals and accommodations required in transit, and up to one week, while awaiting permanent accommodation in the Hamilton vicinity. Please refer to McMaster University's complete Travel Policy and Procedures at <http://www.mcmaster.ca/purchase> and click on Policies and Procedures (Accounts Payable policy number AP-010).

or

- b. the one-time full cost of two-way (return) transportation, to a maximum of economy airfare or equivalent, for the individual and spouse, if applicable, in advance of the relocation for the sole purpose of searching for and establishing residence in the Hamilton vicinity.

Immigration Fees:

In addition to the moving and travel expenses, McMaster University will reimburse the new appointee, his/her spouse and dependent children, if applicable, for the following fees:

1. Right of Landing fee
2. Right of Citizenship fee
3. Application for Permanent Residence fee
4. Employment Authorization

In order to qualify for reimbursement of these fees, original receipts must be presented.

General:

If the new appointee currently lives within a 40 km radius of Hamilton, the policy does not apply

In respect to both travelling expenses and moving of household effects, the place of residence is assumed to be the address to which the letter of appointment is sent, unless specific arrangements in respect to another location have been made.

New appointees wishing to take advantage of these arrangements are required to do so within six months of the effective date of their appointment unless an extension of this time limit is approved, in advance, by the appropriate Faculty Dean's Office or the Academic Department.

Questions concerning travel arrangements, advances, or reimbursement for immigration fees should be directed to the appropriate Faculty Dean's Office or the Academic Department.

Requests for reimbursement should be submitted within 3 months of arrival. Normally, reimbursement is made after the arrival of the new appointee and upon presentation of original receipts. However, should an advance be required for the purpose of relocation arrangements, the request should be directed to the appropriate Faculty Dean's Office or the Academic Department.

Should the new appointee leave the University before completing two years of service, he/she must reimburse the University a portion of any moving expenses paid. The amount will be calculated on the basis of 1/24 of the allowance for each month of the two year period not yet served.

Every effort will be made to recover the relocation expenses for externally funded positions.

Processing of Gifts-in-Kind

Inquiries regarding donations of equipment to McMaster University should be directed to the appropriate Advancement Officer well in advance of the equipment being delivered to a University site. Details such as change of ownership, insurance, shipping details etc. must first be finalized.

Friends of McMaster Inc.: Friends of McMaster Inc., a Public Foundation since 1988, provides a valuable service to McMaster University, enabling non-alumni and corporations in the United States to make charitable donations of equipment, including gifts-in-kind to the University.

Time Requirements: Processing of a gift-in-kind to McMaster University through Friends of McMaster Inc. can take between four to eight weeks. During this period, a two-part transfer of ownership takes place (from the donor to Friends of McMaster Inc. and from Friends of McMaster Inc. to the University), and a fair market value assessment of the gift-in-kind by a third-party is conducted.

Key Contacts: Advancement Officer, University Advancement, Ext. 24622 or
Advancement Officer, Faculty of Health Sciences, Ext. 22196.

FACULTY APPOINTED FOR A CONTRACTUALLY LIMITED PERIOD OF LESS THAN TWO YEARS

Faculty members appointed for a contractually limited period of less than two years are entitled to travel expenses or the appointee, his/her spouse, and all dependent children, to a maximum of economy return airfare by the most direct route from the place of residence to the Hamilton vicinity (the place of residence will be indicated in the letter of appointment). The return portion of the fare will be the rate in effect at the time the appointment ends; if the appointment is extended it will be the rate in effect at the end of the period of extension. Reimbursement will be made at the request of the appointee upon arrival in Hamilton, and vouchers will be required for all expenses incurred. However, should an advance be required, the request should be directed to the appropriate Faculty Dean's Office.

Every effort will be made to recover travel expenses for externally funded positions.

*Approved by the President and Vice-Chancellor
December 17, 2003*

Contact Department: **Business Manager (Office of the Provost)**
