

University of Prince Edward Island	Policy No. admfinfin0004	Revision No. 2
Policy Title: Moving & Relocation Expenses		Page 1 of 4
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Authority: Board of Governors	Responsibility: Vice-President, Admin. & Finance	Access: W

1. Purpose

- 1.1 To provide a uniform set of policies and guidelines for reimbursement of expenses related to relocation to Prince Edward Island by employees appointed to positions at the University Prince Edward Island (UPEI).

2. Scope

- 2.1 This Policy applies to faculty members and contract professional staff of UPEI, who relocate to Prince Edward Island, as the result of being appointed to a position at UPEI.
- 2.2 Unionized support staff appointments of any length and faculty or contract professional appointments of less than ten months are normally ineligible for relocation expenses, unless approved by the Vice-President, Administration and Finance.
- 2.3 Nothing in this Policy is intended to conflict with the UPEI Faculty Association Collective Agreements and other employment contracts. Nothing in this Policy is intended to conflict with Canada Revenue Agency (CRA) guidelines on eligible moving expenses.

3. Definitions

- 3.1 “*Faculty Member*” as defined in the Collective Agreement Between The University of Prince Edward Island Board of Governors and The University of Prince Edward Island Faculty Association Bargaining Unit #1.
- 3.2 “*Librarian*” as defined in the Collective Agreement Between The University of Prince Edward Island Board of Governors and The University of Prince Edward Island Faculty Association Bargaining Unit #1.
- 3.3 “*Contract Professional Staff*” as defined in the Terms and Conditions of Employment for Managerial and Professional Employees (Contract Employees) of UPEI.

4. Authority and Responsibility

- 4.1 This Policy is authorized by the Board of Governors.
- 4.2 The development and maintenance of this Policy is the responsibility of the Vice-President, Administration and Finance.
- 4.3 The administration of this Policy is the responsibility of the Comptroller and the Associate Vice-President, Human Resources & Legal.
- 4.4 In exceptional circumstances, and at the discretion of the Vice-President, Academic, actual moving expenses above these limits may be paid.

5. Policy

- 5.1 Moving expenses and travel costs are reimbursed by submitting to the Accounts Payable Unit of the Accounting Office, a properly completed '*Moving and Relocation Expense Form*' (contained in the Moving & Relocation Expenses Procedures document) approved by the appropriate Vice-President, Dean, or Director.
- 5.2 Original receipts with exception of the per diem meal allowance and the per kilometer rate, are required for claims made under this Policy. Claims made to the University for reimbursement of relocation and moving expenses may not be claimed from any other source, except to the extent that such reimbursement shall result in a refund to the University. Likewise, relocation and moving expenses reimbursed from another source may not be claimed from UPEI.

5.3 Relocation Expenses

The University shall provide economy one-way airfare to Charlottetown plus similar airfare for spouse and dependents, or actual travel costs if less, against receipts. The onus will be on the employee to provide a quote on economy airfare, for comparison purposes, if he/she chooses not to travel by air.

5.3.1 Eligible Relocation Expenses

The following relocation expenses are eligible for reimbursement:

- 5.3.1.1 One-way transportation, meals and accommodation to PEI by the most reasonable direct route, including reasonable amounts for meals and lodging, in the course of moving the employee and members of the household at the time of the offer of employment;
- 5.3.1.2 Up to three (3) days' accommodation and meals on PEI after arrival.

5.3.2 Ineligible Relocation Expenses

The following expenditures are not eligible for reimbursement under this Policy:

5.3.2.1 Costs of relocating relatives or others, who are not dependants and members of the household;

5.3.2.2 Costs eligible for reimbursement from any other source.

5.4 Moving Expenses

In addition to relocation travel costs to Charlottetown contained in Section 5.3 above, eligible faculty and staff are entitled to claim eligible moving expenses as follows:

5.4.1 In the case of relocation from within Canada, moving expenses of up to a maximum of one month's salary;

5.4.2 In the case of relocation from outside Canada, moving expenses up to a maximum of one month's salary plus \$1000.;

5.4.3 In addition, savings realized in Section 5.3 between the actual receipted transportation costs and the equivalent economy airfare(s) to Charlottetown from the nearest point of departure may be applied toward the cost of moving expenses.

5.4.4 Eligible Moving Expenses - (*Note: All eligible moving expenses are subject to the limit described in Section 5.4 above.*)

5.4.4.1 The cost of moving household effects of the employee, spouse and dependants;

5.4.4.2 Selling costs for the sale of the employee's former residence, including advertising, notary or legal fees, real estate commissions and mortgage prepayment or discharge fees incurred on the sale, but not including expenses for work done to make the property more saleable or any loss incurred on the sale;

5.4.4.3 Costs of breaking a rental lease agreement at the old location;

5.4.4.4 Costs associated with one house hunting trip, based on actual receipted travel costs or return economy airfare, whichever is less, and meals and accommodation for up to three (3) days on PEI;

5.4.4.5 In addition to the three (3) days permitted in Section 5.3.1.2, up to four (4) additional days of meals and accommodation costs on PEI upon arrival, and before moving into the employee's new residence.

5.4.5 Ineligible Moving Expenses

The following costs are not eligible for reimbursement under this Policy:

5.4.5.1 Costs associated with maintaining a second residence;

- 5.4.5.2 Costs of travelling from locations other than the previous residence of the employee, unless approved by the University and, if approved, actual costs not exceeding equivalent economy airfare(s) to Charlottetown from the nearest point of departure from the previous residence;
- 5.4.5.3 Any losses incurred in selling previous residence;
- 5.4.5.4 Costs incurred in the sale of your old home if you delayed selling for investment purposes or until the real estate market improved; and
- 5.4.5.5 Any other costs restricted as per the CRA Guidelines.

6. Repayment of Moving and Relocation Expenses

6.1 Eligible faculty and staff who resign from a tenure or permanent stream appointment before the expiry of two years from the date of hire shall repay to the University any associated moving and relocation costs reimbursed to them, or paid on their behalf by the University. Such costs will be reimbursed on a pro-rata basis, or in full if the employee worked nine (9) months or less for the University.

7. Review

7.1 This Policy shall be reviewed at least once every five (5) years.