

# THE UNIVERSITY OF BRITISH COLUMBIA



**Human Resources**  
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**Date:** May 14, 2007

**To:** Deans, Directors, Department Heads, Administrators

**From:** Michelle Berner, Director, Human Resources – Total Compensation

**CC:** Faculty Relations, HR Advisory Services

**Re:** Frequently Asked Questions - Policy #82 – Relocation of Faculty Members and Senior Management Staff

**Attch:** *Expense Reimbursement Claim Form*

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You may be aware that the University's Policy #82 for the Relocation of Faculty Members and Senior Management Staff has been modified. The revised policy is available on the following UBC website: [www.universitycounsel.ubc.ca/policies/policy82.pdf](http://www.universitycounsel.ubc.ca/policies/policy82.pdf).

The following "frequently asked questions" provide additional information about the application of the policy.

We will be including this information on the HR website soon and include FAQs specific to Department Heads and Administrators and new hires. You can also download the **Relocation Reimbursement Claim Form** online at <http://www.hr.ubc.ca/resources/forms.html>.

## **FREQUENTLY ASKED QUESTIONS**

**[1] Question:** There are a number of individual items that have expense "caps" on them, as outlined in the Rates Table (e.g., up to \$3,000 for customs and immigration). There is also an overall expense cap for central reimbursement, for the entire move, as outlined in the Central Fund Contribution Table. How do these two tables work together? Does the department get reimbursed for the overall cap, plus the individual caps, over and above the overall cap?

**Answer:** The Rates Table is a guideline for departments when negotiating terms of relocation with the new hire. The department can choose to make exceptions to these guidelines, provided that they pay for it with department funding. The Central Fund Contribution Table outlines the maximum amount that the central fund will reimburse the department for the relocation. The rates outlined in the Central Fund Contribution Table are the maximum amount that will be reimbursed by the central fund, inclusive of all individual items, regardless of their caps.

**[2] Question:** What happens if a new hire exceeds one of the individual category expense caps, but is still within the overall central reimbursement cap? For example, a new hire spends \$3,500 on immigration-related expenses when the "cap" is \$3,000; however, this new hire's total relocation expenses come in below the total central fund cap of \$7,000 (for designated professional and spouse relocating from outside of Canada). Is the total amount of customs and immigration related expenses reimbursable from the central fund?

**Answer:** For the purpose of central reimbursement, individual category expense caps can be exceeded as long as the total cap is not exceeded. The entire amount would be reimbursed by the central fund up

to the amount outlined in the Central Fund Contribution Table. The policy provides individual caps as guidelines, and departments can strictly adhere to these guidelines when negotiating terms of relocation; however, departments have the ability to allow new hires to exceed the cap in an individual category. The central fund will only reimburse up to the total cap outlined in the Central Fund Contribution Table, and only for expenses that are allowed as per the policy.

**[3] Question:** Can the department agree to pay for expenses that are not eligible under the policy?

**Answer:** Yes, provided that the department pays for these expenses, and does not seek central reimbursement. The central fund will only reimburse for expenses that are allowable under the policy, up to the total cap outlined in the Central Fund Contribution Table.

**[4] Question:** The new relocation policy states that if UBC pays the importation or excise taxes or duty on Tools of the Trade that are imported into Canada, then those specific Tools of the Trade will become the property of UBC. Is there any flexibility on this?

**Answer:** In general, it is up to the department representative who is authorizing the move to ensure that the terms and conditions pertaining to moving the new hire's Tools of the Trade are clear, in advance of the move. In some cases departments wish to purchase the Tools of the Trade from the new hire, and in other cases they do not. The terms of relocation of the Tools of the Trade need to be clearly established in advance of the relocation in order to avoid financial complications at a later time. Departments can opt to pay certain fees and not claim reimbursement from the central fund where such terms and conditions vary from those established in the policy. The policy is meant to be flexible, with protections for both the department and the University.

**[5] Question:** Is the weight of the "Tools of the Trade" included in the overall weight limit?

**Answer:** No; however, the total cost of moving Tools of the Trade is included in the central fund overall cap, which is outlined in the Central Fund Contribution Table.

**[6] Question:** Does the overall cap that the central fund reimburses include travel expenses under Policy #83.

**Answer:** Yes.

**[7] Question:** Is the cost of moving the Tools of the Trade included in the overall cap which the central fund reimburses?

**Answer:** Yes.

**[8] Question:** Is the cost of pre/post move expenses such as a house hunting trip included in the overall cap which the central fund reimburses?

**Answer:** Yes.

**[9] Question:** What happens if the Household and Personal Effects weight limits are exceeded?

**Answer:** The policy provides weight limits as a guideline, and departments can strictly adhere to these guidelines when negotiating terms of relocation; however, departments have the ability to allow new hires to exceed the weight limits. The central fund will reimburse up to the total cap outlined in the Central Fund Contribution Table, in accordance with eligible expenses outlined in the policy, regardless of the total weight.

**[10] Question:** What is the overall cap when a Faculty member and their spouse are both recruited to UBC (i.e., two new hires, but only one household).

**Answer:** Each spouse is eligible for reimbursement by the central fund as a designated professional; however, only one spouse may receive the additional amount for shared dependants.

**[11] Question:** Can a new hire use their moving allowance in two parts (e.g., to move self at one point in time, and then to move the rest of the family at a later time)?

**Answer:** Yes, this is possible. The central fund will only reimburse the department up to the overall cap specified in the Central Fund Contribution Table. In addition, if a move is completed in more than one “installment”, then the department must clearly specify this on the paperwork that is submitted to the central Finance department for reimbursement.

**[12] Question:** How is “senior management” defined; in other words, which staff are eligible under the new relocation policy?

**Answer:** The AVP level and higher are eligible under the new policy. Additional staff may be eligible under the policy with the approval of the Responsible Executive – the AVP, Human Resources.

**[13] Question:** If exceptions are made by a department, will the central fund still reimburse?

**Answer:** Departments are able to make exceptions as long as they pay for the cost of these exceptions.

**[14] Question:** Is there a minimum length of employment that a new hire must be hired for in order to be eligible under the Relocation policy?

**Answer:** Yes, the position must be a “full-time”, ongoing, permanent position. Positions that are temporary, visiting, or sessional are not eligible under this policy. The policy contains a provision that if an employee voluntarily leaves the service of UBC before completing 24 months of paid service, then they must re-pay a pro-rated portion of relocation expenses expended by UBC.

**[15] Question:** Does the relocation have to be from the location where the new hire was residing at the time the appointment was signed?

**Answer:** No. The relocation will be from the location of the new hire at the time of the relocation.

**[16] Question:** Is it mandatory that the relocation company designated by UBC be used?

**Answer:** Yes. In order to be eligible for central fund reimbursement, the designated relocation company must be used. The benefit of utilizing a single vendor is that the University attains competitive rates against the marketplace, in exchange for our business.

**[17] Question:** Does the dependant care allowance have to be incurred in Canada?

**Answer:** No.

**[18] Question:** If the new hire is not paid by GPO funding, should the grant pay for the relocation?

**Answer:** Yes. The form that departments submit to the central Finance department for reimbursement (see attached) includes a question about whether a project grant will pay for relocation. This source of funding is the “first payer” of new hire relocation expenses.

**[19] Question:** Are any relocation expenses considered taxable benefits?

**Answer:** Moving expenses are not considered a taxable benefit. However, customs fees (e.g., immigration fees), and health care insurance are considered taxable benefits. Departments should contact the Payroll Manager (Joanne Young) for issuance of a T4A form for the taxable benefits provided.

**[20] Question:** How does the department get reimbursed for the relocation expenses from the central fund?

**Answer:** All relocation expenses will first be paid by the department. The department should then submit a claim for reimbursement of eligible expenses to the central Finance department (one relocation claim per designated professional). Relocation claims must be accompanied by the following documents:

- An original *Relocation Reimbursement Claim Form* (see attached) authorized by the Administrative Head of the Unit or the Responsible Executive (AVP-HR), identifying that the individual is eligible for relocation assistance in compliance with Policy #82, and
- A copy of the General Ledger and all backup documents (e.g., receipts).

Questions about the relocation policy may be directed to Natasha Malloff in Human Resources at [natasha.malloff@ubc.ca](mailto:natasha.malloff@ubc.ca).

Questions pertaining to Purchase Requisitions or Purchase Orders for specific relocations may be directed to Supply Management:

- For UBC-V: Julie Wang at [julie.wang@ubc.ca](mailto:julie.wang@ubc.ca)
- For UBC-O: Jack Boychuk at [jack.boychuk@ubc.ca](mailto:jack.boychuk@ubc.ca)

Questions pertaining to reimbursement from the central fund may be directed to the Finance department:

- For UBC-V: Irene Wang at [iwang@finance.ubc.ca](mailto:iwang@finance.ubc.ca)
- For UBC-O: Carla Waters at [carla.waters@ubc.ca](mailto:carla.waters@ubc.ca).

Thank you.