

THE UNIVERSITY OF BRITISH COLUMBIA



Human Resources
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Date: April 17, 2007

To: Deans, Directors, Department Heads, Administrators

From: Lisa Castle, AVP, Human Resources

CC: Faculty Relations, HR Advisory Services

Re: Policy #82 – Relocation of Faculty Members and Senior Management Staff

You may be aware that the University's Policy #82 for the Relocation of Faculty Members and Senior Management Staff has been modified. We'd like to take this opportunity to update you on this policy change.

A policy review committee consisting of faculty and staff members, Faculty Relations, Human Resources, Supply Management, Finance, and University Counsel proposed changes to Policy #82 to make it more competitive and family-friendly. The revised policy received approval from the Board of Governors on March 22, 2007 and is now in effect. The policy is available on the following UBC website: www.universitycounsel.ubc.ca/policies/policy82.pdf.

The terms of the revised policy should be considered and applied in all new relocations. For relocations that were already in progress as of March 22, 2007, the terms that were negotiated, which are typically outlined in the new appointee's offer letter, will be honoured.

For your convenience, we've attached the substantive highlights of what's new in the revised relocation policy. Given the importance of this benefit in the recruiting process, departments should take the time to familiarize themselves with the policy. The attached constitutes highlights only.

We look forward to continuing to improve the effectiveness and efficiency of the University's relocation policy in order to attract and retain outstanding Faculty members and senior management staff from around the world. We'll continue to provide updates as we move forward with the revised relocation policy and related processes.

Questions about the revised relocation policy may be directed to Natasha Malloff in Human Resources at natasha.malloff@ubc.ca.

Questions pertaining to Purchase Requisitions or Purchase Orders for specific relocations may be directed to Julie Wang in Supply Management at julie.wang@ubc.ca for UBC-V, and Jack Boychuk at jack.boychuk@ubc.ca for UBC-O.

Thank you.

Highlights of the revised policy are outlined in the following pages.

Highlights:

- √ **Eligibility.** New appointees eligible for relocation assistance under the revised relocation policy (called “designated professionals” in the policy document) continue to include tenure-stream faculty members and prospective tenure-stream faculty members (e.g., professorial ranks, Instructor I and II, Senior Instructor). The eligible group now also includes senior management staff, as approved by the Responsible Executive – the AVP, Human Resources.
- √ **Authorization.** As was the case under the old policy, the terms of relocation assistance are negotiated between the Faculty/Department and the new appointee in advance, and should be outlined in the offer letter. A number of items outlined as “eligible” in the revised policy are subject to “authorization” by the Faculty/Department.
- √ **Tools of the Trade.** In addition to relocation of new appointees’ household and personal effects, the revised policy allows for relocation of “tools of the trade” that are necessary and related to employment with the University. This could include items such as an office library, computer equipment, research equipment, and supplies. Tools of the trade are not counted as part of the weight allowance for household and personal effects.
- √ **Central Reimbursement.** The amount of relocation expense that is reimbursed by the central Finance department is now determined based on two factors:
 - (1) the number of people relocating, and
 - (2) the origin of the move.

Under the old policy the centrally reimbursed amount was based solely on the distance of the move. The new family-friendly reimbursement schedule is outlined in the revised policy, and is also outlined below:

Central Fund Contribution Table		
Number of People in Move	Reimbursement to Unit for Relocations Originating:	
	within Canada	outside Canada
<i>Designated Professional alone</i>	\$4,000	\$4,000
<i>Designated Professional accompanied by Dependant(s)</i>	\$4,000 plus \$500 per <i>Dependant</i>	\$4,000 plus \$1,000 per <i>Dependant</i>
<i>Designated Professional & Spouse</i>	\$6,000	\$7,000
<i>Designated Professional & Spouse accompanied by Dependant(s)</i>	\$6,000 plus \$500 per <i>Dependant</i>	\$7,000 plus \$1,000 per <i>Dependant</i>

The above “Central Fund Contribution Table” will be amended from time to time by the Vice-President, Administration and Finance, and the revised table will be effective on the date of posting.

√ **Other Restrictions on Central Reimbursement.** Aside from the overall cap on central reimbursement, the revised relocation policy outlines caps on individual items. These are outlined below:

Subject of Rate	Maximum Expenses /Rates
a. Automobile transport	<p>Only expenses for personal passenger car, van or truck (up to ½ ton pickups) will be permitted. The rates are as follows:</p> <p>Shipping:</p> <ul style="list-style-type: none"> ▪ <500km – 0\$ ▪ 500km or greater = by rail or truck only at market rates not to exceed \$2500 using the most appropriate service <p>Driven:</p> <ul style="list-style-type: none"> ▪ Rates as apply under Policy #83 <i>Travel and Related Expenses</i> but not to exceed \$2500
b. Dependant Care Allowance	<p>Only if authorized and then for no more than \$25 per day per <i>Dependant</i>.</p>
c. Customs and immigration related expenses	<p>Provided <i>UBC</i> incurs the expense or specifically authorizes the expenditure in advance, which may include designating the service provider, <i>UBC</i> will pay for the listed expenses of the <i>Designated Professional, Spouse, and Dependants</i> to a cumulative maximum of \$3,000 incurred within 3 years of the acceptance of the offer of employment:</p> <ul style="list-style-type: none"> ▪ Translation of documents where translation is required by <i>UBC</i> and/or the Canadian government ▪ Medical examinations required by <i>UBC</i> and/or the Canadian government ▪ Immigration, work permit, and residency visa fees levied by the Canadian government ▪ Police criminal records checks and fingerprinting ▪ Healthcare insurance premiums of the family or person to be covered for up to 3 month immediately preceding that person's eligibility for coverage by the British Columbia Medical Services Plan. <p><i>UBC</i> does not pay for:</p> <ul style="list-style-type: none"> ▪ Emigration or border fees levied by foreign governments ▪ Passports ▪ Legal services or documents
d. Household and Personal Effects-storage	<p>The maximum storage expenses for <i>Household and Personal Effects</i> is one month's storage, if required, and one-time delivery into or out of the storage facility.</p>

e. Household and Personal Effects – weight allowance	The maximum weight covered for <i>Household and Personal Effects</i> is as set out in the following table:
Household and Personal Effects Weight Allowance Table	
Number of People in Move	Weight Allowance
<i>Designated Professional</i> alone	2724 kg (6,000 pounds)
<i>Designated Professional</i> accompanied by <i>Dependant(s)</i>	2724 kg (6,000 pounds), plus 455 kg (1,000 pounds) per <i>Dependant</i>
<i>Designated Professional & Spouse</i>	4550 kg (10,000 pounds)
<i>Designated Professional & Spouse</i> accompanied by <i>Dependant(s)</i>	4550 kg (10,000 pounds), plus 455 kg (1,000 pounds) per <i>Dependant</i>

- √ **Exceeding the Central Funding Reimbursement.** Departments continue to have flexibility to negotiate additional terms of relocation assistance with new appointees. Finance at UBC-V will reimburse eligible expenses in accordance with the policy and the Central Fund Contribution Table. Departments are responsible for funding the remainder of negotiated relocation costs.
- √ **Interim Procedures for Reimbursement.** At this time the procedure for reimbursement of eligible amounts from Finance at UBC-V continues to be the same as it was under the old policy.
- √ **Single Relocation Company.** At the present time Faculties/Departments should continue to engage the services of the two designated moving companies under the CAUBO contract – Armstrong and Premiere. We are in the process of issuing a Request for Proposals (RFP) for a single “relocation” company that will provide service for all UBC relocations. The University’s objective is to partner with a supplier who can assist in:
 - Providing a single contact or “customer care” person to be the central point of contact on a 24/7/365 basis;
 - Identifying opportunities to reduce costs and improve the effectiveness of related processes; and
 - Offering current and consistent information on issues related to relocation, such as immigration, moving options, schools, daycare, and medical coverage.

We are targeting July 2007 for transition to the successful relocation company. Human Resources will play a greater role in relocation at that time, and will work with Supply Management and Finance to review and streamline existing processes.