



Moving/Travel Allowances

Category: Human Resources;

Jurisdiction: Vice President, Administration and Finance;

Approval Authority: Executive Team;

Established on: June 1, 1998;

Amendments: April 1991; January 2003; May 1, 2004; July 1, 2005.

Policy

It is the policy of Lakehead University to assist newly appointed faculty and staff members in the payment of the necessary moving and travel expenses incurred in their relocation to Thunder Bay.

Intent

It is the intent and desire of the University to delineate those employees who are eligible for moving and travel assistance and to outline the conditions and provisions which apply to the receipt of this assistance.

Practice

1. Eligibility

This policy applies to:

1. newly appointed full-time members of the academic staff at the Lecturer level and above, including individuals appointed on a limited term basis;
2. Schedule #2 support staff, Grades 110 and above;
3. Senior technical support staff.

2. Allowances

A. Travel Allowances

The University shall contribute toward the transportation expenses incurred by a new faculty/staff member, his/her spouse and dependent children in their relocation from their place of residence to Thunder Bay, subject to the following conditions:

1. the most direct route from the place of residence to Thunder Bay shall be used in final determination of payment for each mode of transportation;
2. transportation by air shall be paid at the prevailing economy one way air fare from place of residence to Thunder Bay (supported by boarding passes and expense statements);
3. transportation by personal automobile shall be paid at the prevailing University rates but payment shall not exceed the equivalent of one way economy air fare(s). In instances where families are travelling together by personal automobile, payment shall not exceed the equivalent of two one way economy air fare;
4. transportation by rail, ship or bus shall be paid at the prevailing rate for that mode of transportation from place of residence to Thunder Bay but payment shall not exceed the equivalent of one way economy air fare(s) for all family members as described above from place of residence to Thunder Bay.
5. reasonable and actual costs of meals (excluding alcoholic beverages) while en route or per diem as follows:
 1. \$10.00 for breakfast;
 2. \$12.00 for lunch; and
 3. \$28.00 for dinner/supper.

The University shall also pay the reasonable costs of lodging incurred en route (unless included in the fare charges) provided they are supported by receipt vouchers.

B. Moving Allowance

The University shall contribute toward the moving expenses incurred by a new faculty/staff member for removal of personal effects including research equipment if approved by the Dean, and normal household goods from the

appointee's place of residence to Thunder Bay, subject to the following conditions:

1. three (3) quotes by Professional Moving Companies are required to be eligible for the moving allowance;
2. all moving claims must be supported by appropriate expense statements and receipt vouchers;
3. the University shall pay one-hundred (100) per cent of moving expenses up to \$2,500 plus fifty (50) per cent of expenses in excess of \$2,500 to an overall maximum of \$5,000. The move must be by the most direct route from the new appointee's place of residence to Thunder Bay;
4. the moving allowance may only be applied against the costs of packing, moving and unpacking of normal household goods and personal effects, including research equipment approved by the Dean, as well as the insurance costs for these goods and effects while they are in the possession of a carrier;
5. the moving allowance does not cover such items as shipping charges for automobiles and boats, storage of furniture, disconnection and/or reconnection of appliances, hotel or other accommodations while selecting a permanent residence, legal fees, commissions and any other expenses not directly related to the physical removal of personal effects and normal household goods from the appointee's place of residence to Thunder Bay;
6. any faculty or staff member who voluntarily leaves the full-time employment of the University before completing two (2) years of service or prior to the completion of the term of the original appointment, shall be required to refund to the University a portion of the moving expenses paid on the member's behalf. The amount to be refunded will be calculated on the basis of 1/24th of the total moving allowance for each month of the two-year period not served. The refund will be deducted from the faculty or staff member's final salary payment. Where the term of the original appointment is for less than two years and the faculty or staff member

does not complete the term, the amount to be refunded to the University will be calculated proportionate to the number of months not served.

C. House-Hunting Allowance

The University shall contribute toward the cost of one advanced visit by the new faculty/staff member, and/or spouse for the purpose of securing suitable housing in Thunder Bay, subject to the following conditions:

1. all claims must be supported by appropriate expense statements, receipt vouchers and boarding passes;
2. the University shall pay the lesser of: (a) actual expenses incurred by the new appointee and/or spouse for transportation expenses to and from his/her place of residence to Thunder Bay; or (b) an amount equal to the cost of the return economy air fare from the appointee's place of residence to Thunder Bay. The maximum under (a) or (b) may not exceed \$1,125.00 (effective April 1, 2003), adjusted annually by the increase in CPI (Canada) (April over April);
3. the University will pay the lesser of: (a) the actual expenses incurred by the appointee and his/her spouse for meals and accommodation for a three-day period or (b) a per diem rate of \$100.00 for a period not to exceed three days or \$300.00. All expenses claimed must be supported by original receipts;
4. the University will pay for car rental expenses for up to three (3) days to a maximum of \$250.00 including insurance and gasoline;
5. if the new appointee does not make use of the house-hunting allowance he/she may not use it to increase any allowances under sections A and B above.

3. General

1. The University provides a service to faculty/staff members being moved by contracting for moves through the Thunder Bay agents of national moving concerns. Experience indicates that this arrangement tends to yield increased mover care, greatly aids in the processing of any claims resulting from the move, and requires no cash outlay by the

- faculty/staff member at the time of the move. Details of this service may be obtained from the Human Resources Department.
2. Faculty/staff members are personally responsible for all personal living costs, including temporary accommodations, after arrival in Thunder Bay.
 3. The University does not assume any liability nor will it be held responsible for injury or loss which may arise during, or as a result of a new faculty/staff member's move to Thunder Bay.
 4. In respect to both travelling expenses and the moving of household effects, the place of residence is the address to which the letter of appointment is sent unless specific arrangements in respect to another location have been made.
 5. All payments of any monies in accordance with the allowances set out above are in Canadian dollars and are subject to the proper documentation of the expenses incurred (receipts for tickets, meals, accommodations and shipment of personal effects and household goods).
 6. No advance payments against moving, travel or house-hunting expenses are made. All reimbursements are made against receipted invoices or vouchers.
 7. New faculty/staff appointees who wish to take advantage of the provisions of this policy should do so within six months of the effective date of their appointment.
 8. The President, or a Vice-President may give special consideration to a new appointee under exceptional circumstances. Departures from the above policy in any respect must be approved in writing by the President or a Vice-President.
 9. Any questions relating to the interpretation of the preceding relocation provisions should be referred to the Human Resources Department.

Review Period: 7 years;

Date for Next Review: 2023-2024;

Related Policies and Procedures: To be determined;

Policy Superseded by this Policy: None.

The University Secretariat manages the development of policies through an impartial, fair governance process, and in accordance with the Policy Governance Framework. Please

contact the University Secretariat for additional information on University policies and procedures and/or if you require this information in another format:

Open: Monday through Friday from 8:30am to 4:30pm;

Location: University Centre, Thunder Bay Campus, Room UC2002;

Phone: 807-346-7929 or Email: univsec@lakeheadu.ca.