



### **RU Policy No. 2.3**

**Responsible Division:** Human Resources

**Originally Issued:** 03/2018

**Last Revised:** 03/2018

**Revised Effective Date:** 03/2018

## **Relocation Expense Policy**

### ***Policy Statement***

In recognition of the fact that the selected candidate for a position at the University may live outside of Illinois, the University has established this Relocation Expense Policy to provide a moving allowance to an eligible Employee who has relocated to the Chicago metropolitan area to be employed by the University.

The University reserves the right to modify or amend this Policy at any time, at its sole discretion. Any change to this Policy will become effective at the time designated above, and the changes will apply to both prospective students and those already enrolled. This Policy does not constitute an express or implied contract between Roosevelt University and any past, present, or prospective student, employee (including administrator, faculty, or staff), contractor, or volunteer. Unless otherwise stated, the term "Employee" as used in this Policy shall refer to all employees (including administrators, faculty, and staff), but not to contractors or volunteers.

### ***Policy***

The University may offer and provide to an **eligible** exempt Employee a moving allowance for **actual moving expenses** (excluding relocation and search expenses) ("Allowance") that the employee incurs to relocate to the Chicago metropolitan area to commence their first position with the University ("Expenses"); non-exempt Employees are not eligible for an Allowance under this Policy. The term "actual moving expenses" means the actual costs for (i) the packing, movement, and insuring of household goods, appliances, and personal effects for such goods from the point of departure to the point of arrival, (ii) transportation expenses for Employee and dependents to the new home, and (iii) connecting or disconnecting utilities required as a result of moving household goods, appliances, or personal effects. Actual moving expenses do not include travel and other expenses associated with the search for new employment or housing, or the costs of selling, purchasing, or renting a residence.

The University's provision of the Allowance shall be subject to the following limitations:

1. An Employee is only eligible for the Allowance if the Employee:

- a. Is relocating to the Chicago metropolitan areas from at least fifty (50) miles away from their current home or most recent work location; and
  - b. Is expected to work full time for at least 39 weeks during the first twelve (12) months after their relocation; and
  - c. Is expected to work full time for at least 39 weeks during the first twelve (12) months after their relocation; and
  - d. Is going to work in an Eligible Position.
2. A position is an Eligible Position if:
- a. It is classified as one of the following types of Employees on a contract: a full-time faculty member on a contract, a full-time academic leader (*e.g.*, Vice Provost or Dean) on a contract, a full-time executive or University officer (*e.g.*, Vice President) on a contract, or a full-time, at-will administrator with a title that includes Associate Vice President or Associate Provost (*e.g.*, Senior Associate Vice President); or
  - b. It is classified as any other type of full time at-will Employee and before the position is posted, approval for an Allowance is obtained from the VP of Human Resources, VP of Finance & Administration, and the VP in whose Division the position will sit.
3. Employee shall be expected to remain with the University for at least twelve (12) months; however, nothing in this Policy shall change the at-will nature of any employment relationship nor otherwise create an obligation on the part of the University to retain an Employee for any specific period of time.
4. If Employee resigns before having been employed by the University for twelve (12) months, Employee shall repay the Allowance to the University within sixty (60) days of the Employee's last day with the University.
5. All Expenses must be incurred within 120 days from Employee's start date with the University.
6. The Allowance shall be subject to federal and state tax withholdings and shall be paid on the Employee's first paycheck with the University.
7. Employee shall be responsible for the tax implications of the Allowance.
8. The Allowance will be capped at the following levels:
- a. Up to \$1,000.00 for relocation from 50-250 miles from the Employee's Campus

- b. Up to \$2,000.00 for relocation from 251-500 miles from the Employee's Campus
- c. Up to \$3,000.00 for relocation from 501-750 miles from the Employee's Campus\*
- d. Up to \$4,000.00 for relocation from 751-1,000 miles from the Employee's Campus\*\*
- e. Up to \$5,000.00 for relocation over 1,000 miles from the Employee's Campus\*\*

"Employee's Campus": Mileage will be determined using the straight line distance from Chicago campus zip code of 60605 or the Schaumburg campus zip code of 60173 (depending on which campus will be the Employee's primary campus location) to the Employee's home address zip code as of the date that the employment offer is accepted.

\* No Employee shall be offered a relocation Expense over \$3,000.00 unless the hiring manager has obtained the prior approval of the appropriate Divisional Vice President.

\*\* No Employee shall be offered a relocation Expense over \$5,000.00 unless the hiring manager has obtained the prior the appropriate Divisional Vice President and the VP of Human Resources.

- 9. The University reserves the discretion to determine whether to offer an Allowance to an eligible Employee.

***Entities Affected by this Policy***

All Divisions of the University.

***Related Documents***

None.

***Revision and Implementation***

The Vice President of Human Resources shall have the authority to revise this Policy, subject to the approval of the President's Executive Council.

The following shall have the authority to establish any procedures necessary to implement this Policy:

- The Vice President of Human Resources; and
- The Vice President of Finance and Administration.