

**Household Relocation Expense Allocation and Procedures
New Tenure/Tenure Track Faculty with
Hiring Dates Effective Fall 2006/Spring 2007**

Following are the SFSU relocation procedures for new tenure track faculty who will be moving to the San Francisco Bay Area. Household goods relocation and travel of the individual to his/her new home require compliance with both IRS and CSU regulations. We have designed these internal procedures for our campus to assist the new faculty and to ensure that the campus meets the requirements of regulatory agencies.

Household Relocation Contacts for new tenure track faculty:

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Each new tenure track faculty person who is hired from outside the San Francisco Bay Area will be contacted personally. The purpose of this contact is to assist the new employee with planning his/her move and to ensure that all necessary paperwork is processed. Deans are asked to provide the phone, address, and email information of all new tenure track faculty eligible for relocation assistance.

Governing Policy:

Refer to CSU Internal Procedures Governing Reimbursement for Moving and Relocation Expenses (HR 2004 - 35 Attachment B), the SFSU Travel Policies and Procedures, and this document for policies governing household goods relocation.

Direct Billing Arrangements with Moving Van Lines:

We highly encourage getting at least two estimates in order to make an informed decision about the pending move. New employees may either contact the van lines listed below or companies of their own choosing

SFSU has direct billing agreements with three moving companies. They will direct bill the university for the portion of the move covered by the allocation. Should there be a balance due, it is the new employee's responsibility to arrange with the vendor to make that payment.

These vendors must be contacted directly to take advantage of our direct billing arrangements. They will assign an estimator from the employee's point of origin to provide an estimate for the move. All arrangements are made through the agencies listed below and the purchase orders are written through Academic Resources.

Our three van line agency contacts are:

Moving Company:	Atlas Van Lines
Agent:	Ace Worldwide
Customer Service Rep:	Team: Kim Aguilera Kim.Aeuilera@aceworldwide.com Shaina Perreira Shaina.Perreira@aceworldwide.com
Telephone:	1-800-447-9779 (these emails are linked, voicemail is shared)

Moving Company:	United Van Lines
Agent:	S&M Moving Systems
Customer Service Rep:	Becky Rowell (beckvrowell(&smmoving.com))
Telephone:	1-888-693-4110

Moving Company:	North American Van Lines
Agent:	Greater Bay Area/ Meridian
Customer Service Rep:	Janet Gonzalez (direct: 510-401-5361)
Telephone:	1-800-676-6683

Other Household Move Options:

- A new faculty member may choose to rent a U-Haul, Ryder or other rental vehicle and move the household goods on his/her own.
- There are new services available that allow the employee to pack a vehicle container and the commercial company then drives the goods to the destination. These services are advertised on the Internet.
- Smaller households can be moved with a commercial packing, crating, and shipping service.

All such moves are contracted for directly by the new employee and may be reimbursed when the expenses are supported by proper documentation and receipts.

FUNDING YOUR MOVE:

Relocation Funding	Relocation funding through this program is provided by the Provost's Office and comes from the 2005/06 fiscal year budget.
Scheduling the Move	It is preferable that all related expenses are incurred after July 1 and before June 30 of the fiscal year. <u>For exceptions to this</u> , please contact the Academic Resources Relocation Coordinator (see above).
What can be paid for with the relocation funding?	Academic Affairs provides an allocation for: <ul style="list-style-type: none"> • Moving the new faculty member's household goods (detailed below) • Reimbursing the new faculty member and spouse or domestic partner for allowable travel expenses from their point of origin to San Francisco within the requirements of CSU HR 2004-35 and the SFSU travel guidelines.

Household Goods Allocation

The allocation for moving household goods is intended to provide full or partial reimbursement for actual and necessary expenses incurred for transportation, storage in transit (not to exceed 30 calendar days), and installation of the employee's household goods at the new residence when properly documented by invoices and receipts. Up to \$500 of this allocation may be used to reimburse the new employee for the cost of fees charged by rental agencies to secure rental housing. This expense must be documented by receipts and is considered taxable.

Following is the allocation schedule for relocation of household goods from the new employee's current residence to his/her new home in the San Francisco area.

California (beyond IRS rule), Oregon, Washington, Nevada	\$2,000.00
Rocky Mountain States, New Mexico, Arizona, Texas, Midwest	\$2,500.00
South, Eastern, and Northeastern U.S.	\$3,000.00
From outside the U.S.	\$3,500.00

Travel Expense Allocation:

In addition to the above schedule for household goods, Academic Affairs will reimburse the new employee and spouse or domestic partner for relocation travel (defined as a one-way trip from the former residence to the general area of the new campus) in accordance with the CSU Internal Procedures Governing Travel Expenses and Allowances. Such expenses may include actual lodging expenses (supported by receipts), one-way airline travel, or driving (one) personal vehicle to the new location (reimbursed in accordance with the IRS regulations). Note: House hunting trips are not reimbursable under these guidelines.

We recommend that all candidates consult their personal tax consultant to determine tax implications of their relocation.