Household Relocation Expense Allocation and Procedures

Following are the SFSU relocation procedures for new Executive Level Administrators and 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 employees and to ensure that the campus meets the requirements of regulatory agencies.

**Household Relocation Contact for new Executive Level Administrators:**

Marianne Papa [mmango@sfsu.edu](file:///%5C%5Csec.sfsu.edu%5Chr%5Chome%5C900033854%5CDesktop%5Cmmango%40sfsu.edu)

Steve Blecha [sblecha@sfsu.edu](file:///%5C%5Csec.sfsu.edu%5Chr%5Chome%5C900033854%5CDesktop%5Csblecha%40sfsu.edu)

Each new Executive Level Administrator 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. Any travel reimbursement must be pre-approved and documented in the official offer letter.

**Household Relocation Contact for new tenure track faculty:**

Dwayne Banks dbanks@sfsu.edu

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 Updated Moving & Relocation Policy & Updated CSU Internal Procedures Governing Moving & Relocation Expenses (HR 2018-07) memo, Tax Information Changes to Moving & Relocation Expenses (Technical Letter 2019-02), 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 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 two 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 by the relocation coordinator through Academic Resources (faculty) or by the travel coordinator within the hiring department (management).

**Our van line agency contacts are:**

 **Moving Company:** Atlas Van Lines

**Agent:** Ace Worldwide

**Customer Service Rep:** Wade Bute wade.bute@aceworldwide.com

**Phone:** 866-315-6683

**Moving Company:** Allied Van Lines

**Agent:** NOR-CAL Moving

**Customer Service Rep:** Jennifer Silva jsilva@nor-calmoving.com

**Phone:** 800-543-4668

**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 also services that allow the employee to pack a container. 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:**

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| **Relocation Funding** | Relocation funding through this program is provided by the hiring department/individual cabinet area.  |
| **What can be paid for with the relocation funding?** | The University (hiring department or Academic Affairs) provides an allocation for:* Moving the new employee household goods (detailed below)
* Reimbursing the new employee and spouse or domestic partner for allowable travel expenses from their point of origin to the San Francisco bay area within the requirements of CSU HR 2018-07 and the SFSU travel guidelines.
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**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 Provost’s Office allocation schedule for relocation of household goods from the new faculty members 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, Northeastern U.S., Hawaii, and Alaska $3,000.00

From outside the U.S. $3,500.00

**Travel Expense Allocation:**

In addition to the above schedule for household goods, the University will reimburse the new employee and spouse or domestic partner for relocation travel (defined as a *direct* 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 and a maximum of $275/night excluding tax), one-way airline travel, or driving (one) personal vehicle to the new location (reimbursed in accordance with the IRS regulations, currently 20 cents per mile). **Note:** House hunting trips are not reimbursable under these guidelines.

San Francisco State University has established two thresholds for reimbursement of moving and relocation expenses. Reimbursement of expenses that exceeds $5,000 requires the specific Vice President’s approval in writing. Reimbursement that exceeds $10,000 requires the President’s approval in writing.

**As a reminder, the CSU Internal Procedures Governing Reimbursement for Moving and Relocation Expenses authorizes expenses that are subject to taxation for the employee. Any such reimbursement shall be documented, paid and reported in accord with established accounting practices and state and federal regulations. We recommend that all candidates consult their personal tax consultant to determine tax implications of their relocation.**