

EMPLOYEE RELOCATION SERVICES

Expanding our focus on Onboarding

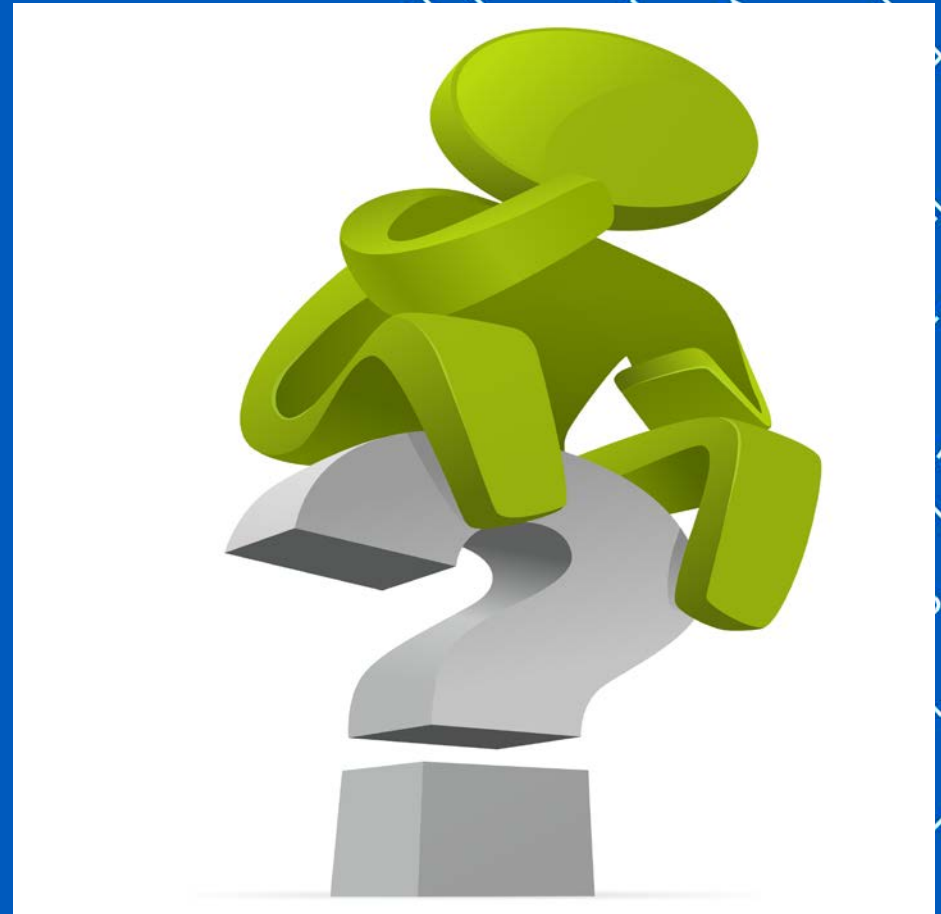
Human Resources

Fall 2017

CONGRATULATIONS!

You just made an offer to a great candidate for your vacancy – and the potential employee is considering your offer.

Will UB be their choice??



COMING SOON to a University near you:

Employee Relocation Services



WHY THIS SERVICE?

- Attract the highest quality faculty & staff
- Be competitive with other higher ed institutions
- Ensure consistency across campus
- Provide proper fiscal stewardship
- Improve financial reporting



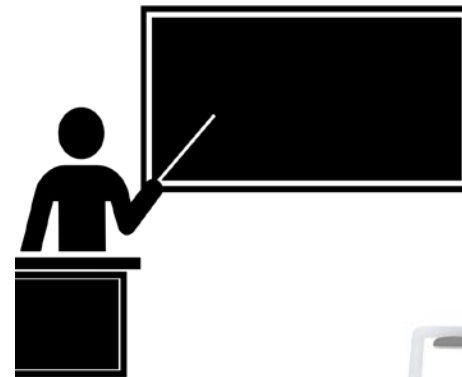
RELOCATION CAN BE STRESSFUL



- Historically, depts offer \$0 - >\$25K for moving expenses, with not much other support to the new hire
- Uneven benefits → dissatisfaction when discuss with others
- Reimbursement method can cause financial hardships (new PhDs)
- Often don't know where to start to find local WNY information
- Creates stress for new hire -- new job, uproot family, PLUS moving logistics and funding

SERVICES WILL BE OFFERED TO:

- Tenured or tenure-track faculty
- Athletic coaches
- “Senior-level” administrative staff
- Deans, VPs



ELIGIBILITY

UB will fund reasonable, necessary and appropriate costs for relocating appointees, their spouse/partner, dependents and personal possessions if the appointee is:

- Appointed to a full-time, salaried, permanent position
- Expected to work minimum 1 year (*admin*) or 2 consecutive semesters (*faculty*)
- Funded by any funding source, or combination of funding sources
AND
- UB must be minimum 50 miles farther from former residence than former position was to former residence (*IRS*)



APPROACH

- UB has identified a vendor/partner (Global Mobility Solutions) to professionally arrange relocation services
- All contact with vendor will be through HR
- Upon receipt of signed offer letter, dept contacts HR to discuss eligibility and provide appointee contact information
- HR sends appointee program information, maximum allowance and a repayment form for signature (if voluntarily separates before 39 wks/ 12 mos)
- HR authorizes the vendor to initiate an estimate that depts will approve
- Depts identify funding source(s) and authorize relocation; HR contacts vendor
- Selected vendor will use their network of suppliers for services
- UB billed monthly; depts will receive copy from HR – no outlay of \$\$ by new hire
- Move should be complete within 12 mos of appointment (tax consequences if > 12 mos) – not all household members must move simultaneously
 - employee signs acknowledgement of completion



SERVICES AVAILABLE – customized to needs

- Relocation Counseling
 - Identify needs - Budgeting
 - Information packet
- Household Goods Shipping
 - Pack, load, deliver, unload (*not unpacking*)
 - Special needs – pets, vehicles, mobile home
 - Self-move – rental of truck & equipment
 - Insurance
- Temporary Storage
- Temporary Living Quarters
- Travel Arrangements
 - Real estate agent
 - Tours of community, schools, elder care facilities, etc.
 - WNY resource materials



BENEFIT COST & FUNDING



- Three levels, depending on position type (maximum allowance)
 - Tier 1 - \$5,000
Senior-level administrative staff; athletic coaches
 - Tier 2 - \$10,000
Tenured & tenure-track faculty
 - Tier 3 - \$15,000
Deans, VPs
- Depts provide funding source(s) and account(s); funds pulled by Financial Management; paid through UBF to provide consistent benefits

COMMUNICATION

- Dedicated relocation counselor for each employee
- Web portal information available
- Employee feedback forms – information available to UB
- Employee receives information on taxable benefits received
- UB receives individual & aggregate cost information
- All communication between vendor and UB will be through HR



Q & A



Q: What if we want to pay more than the maximum allowance for covered services, or for non-covered services, for a high-value candidate?

A: To promote a consistent relocation program, provide a one-time salary supplement (also receives). Do not refer to it as “relocation” but as a “signing bonus” or “additional payment.” Must be for *already-covered* services. That said, there may be legitimate needs for “exceptions” and those must be discussed by the department, HR and ultimately with the vendor.

Q: What if we want to cover other services not mentioned, like selling of current home?

A: Given our goal of consistency and the desire to be cost-efficient, that is not permitted.

Q: Can qualified faculty titles be included?

A: No. The program’s focus is to attract top-tier talent for the long term. Qualified titles are typically short-term.



Q & A (continued)

Q: What if a department doesn't have funding for these amounts?

A: We suggest you work with your financial liaisons in Financial Management or Resource Planning.

Q: What if a new hire wants to use a different vendor for these services?

A: UB will not reimburse the appointee for such expenditures and departments will not be allowed to process expenditures using a different payment method. Some expenditures are taxable/reportable to IRS. Doing so also circumvents our program goals of consistency, financial reporting and utilizing economies of scale.

Q: Can volume increases during peak recruitment times be accommodated?

A: This was an important criterion in our RFP – so, Yes!

Q & A (continued)

Q: How/who will determine who is a “senior-level” administrative staff member?

A: HR and the dept will jointly determine the employee’s eligibility.

Q: Is this program “fixed”?

A: No. Exceptions and unusual circumstances can be discussed with HR as the need arises. However, we want to limit “exceptions” since one of our program goals is “consistency.” We will evaluate our collective experience over time and make any needed adjustments to our policy/program to achieve this goal. We welcome your feedback and will be receiving feedback from new employee surveys the vendor will conduct.

CONTACTS IN HR

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ANY
QUESTIONS
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