



# Relocation Expense Guidelines

## *Purpose*

The purpose of the Relocation Expense Guidelines is to provide direction to UW-Green Bay hiring authorities regarding reimbursement for relocation expenses incurred by newly hired employees. These guidelines are written in accordance with [SYS 240: Relocation \(Household Moves\) and Temporary or Indefinite Work Assignments](#).

## *Definitions (UW-Green Bay Specific)*

- **Approving Authority:** Area Leader (Chancellor or Vice Chancellor) or delegated Dean/Division Leader who approves expenses for relocation.
- **Authorization letter:** A letter that specifically outlines and approves university funding and amounts for relocation stipends. For UW-Green Bay, the appointment letter serves as the authorization letter.
- **Employee:** Any individual who holds an ongoing, budgeted faculty, academic staff, university staff, or limited appointment with any UW System institution.
- **Headquarter location (Home Campus):** The official location where the employee's work is performed on a permanent basis. Typically, the campus or institution office. The home campus is identified on the formal appointment letter.
- **Standard Relocation Stipend:** A lump sum of money established at the institution level, and issued at the discretion of the hiring authority, to cover the reasonable and necessary costs of moving the impacted employee or new hire, their immediate family, their furniture and personal effects as well as the related travel expenses associated with relocation, consistent with federal law, state law and university policies.
- **Supplemental Relocation Stipend:** Payment in excess of the standard relocation stipend, established at the institution level and issued on an exception basis at the discretion of the Chancellor to supplement the standard relocation stipend in those circumstances when the relocation expenses of the impacted employee or new hire are subsequently determined to be unusually high and a failure to grant a supplemental stipend would create a hardship for the impacted employee or new hire.

## *Eligibility*

Relocation stipends for new employees including Faculty, Academic Staff, Limited and University staff may be authorized and funded through the hiring department. Reimbursement is not allowed for employees appointed as Faculty, Academic, or University Staff temporary or project.



### ***Distance Requirements***

Payment of a relocation stipend may be allowed if the distance between the new home campus and the old residence is at least 35 miles farther than the distance between the former place of employment and the former residence, and the distance between the new and former residence is at least 35 miles. If the approving authority determines that a relocation is a mandatory condition of employment, the minimum distance requirements are not applicable.

### ***Timing Requirements***

Unless otherwise authorized by the approving authority, to be eligible for a relocation stipend, the employee must move no later than one year from the effective date of the appointment or the end of probation, whichever is later. Relocation stipends may be received through the university's reimbursement process not more than 30 days in advance of the relocation date, and payments must be requested within 90 days after the move.

### ***Reimbursement Amounts***

#### ***Standard Relocation Stipend:***

- Standard stipends **up to \$3,000** may be approved by the approving authority to cover the reasonable and necessary costs of moving the impacted employee or new hire, their immediate family, their furniture and personal effects as well as the related travel expenses associated with relocation.

#### ***Supplemental Relocation Stipend:***

- Supplemental stipends (**in excess of the \$3,000 standard stipend**) may be approved by the Chancellor when the relocation expenses of the new hire are subsequently determined to be unusually high and a failure to grant a supplemental stipend would create a hardship for the impacted employee or new hire.
- Supplemental stipends must be authorized in writing by the Chancellor prior to sending the appointment letter to the candidate.
- The determination of whether or not to award a supplemental stipend should include consideration of the factors as outlined in [SYS 240: Relocation \(Household Moves\) and Temporary or Indefinite Work Assignments](#)



### ***Process for Stipend Approval***

Prior to the issuing of an appointment letter, the approving authority (and Chancellor as applicable) must authorize in writing the payment of an employee relocation stipend. Approval of *standard relocation stipends* are secured as part of the [Authorization to Extend Offer](#) process.

If the relocation stipend amount on the [Authorization](#) is greater than \$3,000, approval of a *supplemental stipend* must be gathered in writing from the Chancellor. The Area Leader approving the Authorization should send the request via email to the Chancellor (cc: HR) with the request for a supplemental stipend and justification (as outlined in the section above). Chancellor approval of the supplemental stipend will be retained in the recruitment file.

After all needed approvals are gathered, relocation stipend information may be included in the appointment letter and sent to the candidate. Language in the appointment letter will include a single total dollar amount, which is inclusive of both the standard and supplemental stipends.

### ***Payment of Relocation Stipends***

Candidates will receive relocation stipend payment through the university's [e-reimbursement process](#). No receipts are required, but the appointment letter must be submitted as documentation for the payment of the stipend.

### ***Repayment of Stipends***

In the event that the candidate does not start employment as outlined in the appointment letter, they will be required to repay any relocation stipend paid out to them by the University.

### ***Commercial Carriers***

Employees may contract with a commercial carrier of their choosing for van line transport and related services or self-move. For employee convenience, the UW System offers competitive rates and terms with [commercial carriers](#), but employees are not required to use these carriers. The University is not part of any agreement for relocation services. Any agreements entered into with a relocation vendor are between the employee and the vendor.

### ***Taxability***

In accordance with IRS regulations, stipends for relocation costs are considered taxable income and subject to applicable [income and employment taxes](#). Consult the [Relocation \(Household Moves\) and Temporary or Indefinite Work Assignments policy](#) for details.



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***References and Resources***

- [\*SYS 240: Relocation \(Household Moves\) and Temporary or Indefinite Work Assignments\*](#)
- [\*IRS Regulations – Publication 521, Moving Expenses\*](#)

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