

Moving Guidelines



Note: Effective January 1, 2018, all moving expenses paid or reimbursed by Baylor will be included in taxable income to the new employee and reported on Form W-2.

Purpose

In support of our mission to recruit and retain the highest quality faculty and staff, Baylor provides a benefit to offset the cost of relocation expenses to eligible new hires. Our goal is for your transition to Baylor and Waco to be an enjoyable experience and we will do our best to assist you during this exciting, but potentially stressful time. At Baylor, we strive to fulfill the calling of judicious stewardship in every use of our resources. With respect to this relocation benefit, we ask that you join us by being good stewards of the allocation provided to you.

Eligibility

The following employee categories are eligible for the move benefit:

- Regular full-time faculty
- Eligible executive/professional staff
- Authorized Athletic Department staff

For moving expenses to be eligible for University reimbursement, the distance between the employee's new work location and their former residence must be at least fifty (50) miles greater than the distance between the employee's old work location and their former residence.

Relocation Benefit

The maximum amount the University will pay for eligible reimbursable expenses is as follows:

- *For Faculty* – Up to one month's gross pay determined by the agreed upon annual salary detailed in the

employees executed contract.

- *For Staff* – Up to one month's gross pay determined by the agreed upon annual salary detailed in the offer letter provided to the employee.

Baylor University will provide relocation assistance to aid in the move of only one household.

Procedures

New employees have the option of hiring a Baylor-contracted moving company, selecting their own professional moving company, or performing a self-move, as follows:

1. Hiring a Baylor-Contracted Moving Company

1. Baylor's contracted moving companies are listed below as an option for new faculty or staff relocation. To obtain a written estimate(s) from one or more of these companies, please contact Austin Emlet at 710-8657 or **Austin Emlet**.
2. Before the move takes place, written estimates will be submitted by the moving company to Procurement Services and the new employee. Once the estimate(s) have been reviewed and approved, the new employee will notify Procurement Services of their selection.
3. Once the move is completed, the moving company directly invoices the University, and Baylor pays in full up to the new employee's relocation benefit detailed above.

2. Selecting a Professional Moving Company, or Performing a Self-Move

1. Expenses for hiring a professional moving service company different from Baylor's contracted moving companies, will initially be paid by the new employee.
2. Once the move is completed, the new employee submits expenses for reimbursement, as detailed below.

Reimbursement Procedure

Faculty and staff members may be eligible for reimbursement of moving expenses through the process outlined below:

1. Expenses must be substantiated with original and detailed receipts.
2. Reimbursement will be determined by the University based upon the Reimbursable Expenses listed below.
3. All moving-related receipts and documentation must be submitted via e-mail to the new employee's departmental TRAX/Budget contact.
4. Expenses which exceed the new employee's benefit amount will be the sole responsibility of the new employee.
5. Submission of receipts and documentation must be within 30 days after the move is completed.

Reimbursable Expenses

1. The cost of moving household goods to the new location.
2. The cost of insurance for household goods, not to exceed the full replacement value.
3. The cost of moving household vehicles, if not used in the move.

4. The cost of packing household goods (packing supplies that do not become the personal property of the employee are eligible for reimbursement).
5. The cost of loading/unloading household goods.
6. Fees associated with utility disconnects and hookups.
7. The cost of moving pets.
8. The cost of economy class one-way airfare for transporting the faculty/staff member and each member of the household. Only one trip per member is allowed. Ground transportation costs from the airport to the new residence are also allowed.
9. The cost of driving an automobile for transporting the faculty/staff member and each member of the household. The most direct route between the former residence and the new permanent residence is covered. Mileage for personal vehicles is reimbursed at the current moving rate approved by the IRS. Gas receipts for rental vehicles are reimbursable. Only one trip per member is allowed.
10. Lodging and meal expenses (meals will be taxable): actual reasonable expenses are covered for room and meal expenses incurred while in the process of relocating. This includes one night's expenses incurred upon arriving at principal site of employment.
11. The cost of storing and insuring household goods and personal effects within any period of 30 consecutive days after the day items are moved from the former residence and before they are delivered to the new residence.

Non-Reimbursable Expenses

1. Additional expenses incurred after arriving at the principal site of employment that are unrelated to the relocation.
2. Fees assessed for updating vehicle registrations or driver's licenses.
3. Expenses of buying or selling a home (including closing costs, mortgage fees, points, taxes, etc.).
4. Expenses of entering into or breaking a lease.
5. Return trips to former residence that are not for the purpose of moving household items, etc.
6. Security deposits.
7. Personal expenses not directly related to the household relocation.
8. The costs of boarding pets.
9. Storage costs that are incurred after 30 days from the day your items are moved from your former home.
10. House hunting expenses.

Tax Treatment

Effective January 1, 2018, all moving expenses paid or reimbursed by Baylor will be included in taxable income to the new employee and reported on Form W-2.

Exceptions to Policy

Exceptions to this policy require advance approval by the divisional vice president, with any additional costs incurred to be funded by the department of the new employee.

Contracted Moving Companies

Norco Moving and Storage

Don Bannister

don@norcomovingstorage.com

469-688-3411

972-438-6683

United Van Lines

Stewart Simons

SSimons@CentralSystems.com

254-662-2884

Berger Allied Van Lines

Mark McIntire

MarkM@bergerallied.com

817-799-3012

800-678-3980

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