A. General Policy Statement:

The purpose of this policy is to inform new employees of the policies and procedures that will apply to relocation. Since funds for your relocation costs are derived from a Federally funded subcontract, there are limits on what types and amounts can be paid. This Policy should guide you through what can and cannot be paid to you.

B. Relocation Costs that can be Paid with Subcontract Funds (OMB A-122 cost principles) are:

1. The costs include transportation to the new location for you and members of your immediate family and your household and personal effects. The following criteria and definitions apply:

   a) All transportation costs for you and members of your immediate family shall be in accordance with the TAMRF/ODP Travel Policy, in effect at the time of hire.

   b) Members of your immediate family shall mean any of the following members of your household at the time you accepted the employment offer:

      i) Spouse;

      ii) Children of you and/or your spouse who are unmarried and under the age of 21 years of age or who, regardless of age, are physically or mentally incapable of self-support. The term children shall include any child in which you have a legal obligation to care for;

      iii) Dependent parents. Parent(s) who live with you and you provide support to, without which the dependent parent would be unable to maintain a reasonable standard of living.

2. Advance trips to find a new residence and/or temporary lodging for you and your immediate family and/or temporary storage for personal property during a
transition period cannot exceed the cumulative maximum number of days specified in your employee offer letter.

Only you and/or your spouse’s travel and allowable travel related expenses are reimbursable for the advance trips, and your spouse’s travel is limited to one trip.

C. Transportation for the Employee’s Household and Personal Effects to the New Location:

The following criteria shall apply in order to claim reimbursement for the transportation costs:

Only your personal property and personal effects that belong to you or your immediate family when the shipping begins can be claimed.

D. Transportation of the Employee, Spouse and Immediate Family to the New Location:

All travel costs shall be in accordance with the TAMRF/ODP Travel Policy in effect at the time of travel. You should have received the current TAMRF/ODP Travel Policy with your employment offer letter. The following are additional travel criteria that relate only to relocation travel and are not specifically addressed in the TAMRF/ODP Travel Policy:

1. If you and an immediate family member drives more than one personal automobile when the actual move takes place, in lieu of flying, you can claim mileage for both vehicles up to the equivalent economy airfare costs that would have been incurred if a commercial airline would have been used. If the total costs for both vehicles are less than the allowable airfare(s), they can be claimed in accordance with the TAMRF/ODP Travel Policy and other limits set forth in this Policy. Mileage costs, after arrival in the College Station area, are not reimbursable.

2. Meals and lodging, when en route by automobile, will be paid on the basis of a minimum driving distance per calendar day, which is not less than an average of 300 miles. Meals will be at the rate for the geographical location where the meal was provided. Receipts for all lodging must be retained and submitted with the claim. This is important since reimbursement for lodging cannot be made without a receipt. The meal rates published for that geographical area will apply to the you and if applicable, your spouse and immediate family. Receipts are not required for meals if using the per diem method.
E. **Examples of Some Types of Costs the Employee Cannot Claim Reimbursement for Under this Policy are:**

1. Additional insurance against damage or loss of your property or personnel effects or extra value insurance (commonly referred to as a valuation insurance) which is on top of the basic insurance provided in the commercial carriers standard rates. It is strongly recommended any items that are irreplaceable or of extreme value or sentiment be personally transported by the employee.

2. Items identified as unallowable in the Travel Policy.

3. IRS taxes cannot be claimed.

4. Costs associated, including the transportation, of property for resale, disposal, or commercial use rather than for use by the you or your immediate family, cannot be claimed.

5. Any type of costs in excess of the maximum dollar amount specified in the employment offer letter.

6. TAMRF/ODP does recognize there are other many other types of costs that are incurred by you in moving to a new location. However, since these are direct charges to a Federal subcontract, we are unable to reimburse the employee for all of their costs. You must understand that claims can only be made for costs specifically identified in this Policy as being reimbursable in Paragraphs B, C and D above and that claims cannot be processed any other types of costs.

F. **New Employee’s Responsibilities:**

You are responsible for complying with the requirements and restrictions in this Policy. If you have any questions, you can contact the applicable person who is indicated in this Policy. If you are not sure who can answer your question, contact the Supervisor of Human Resources/Insurance Services who will then determine whom within ODP is knowledgeable in that particular subject and have that person contact you.

Since the goods to be shipped are your property, any shipping agreement shall name you as the shipper. You have agreed to assume any and all risks associated with the relocation and indemnify the TAMRF/ODP from any liability whatsoever associated with the relocation.

You are responsible for paying any unallowable cost or cost in excess of the limit set forth in your employment offer letter.
You have agreed that if you resign for any reasons within your control, within twelve (12) months after your hire date, you shall be fully responsible and liable for reimbursing TAMRF/ODP for any and all relocation costs that were paid to you and/or any costs that were incurred directly by TAMRF/ODP. This payment shall be made no later than three (3) months after the termination date.

You have agreed that the offer to be reimbursed for relocation costs is only valid for twelve (12) months after your hire date. If you do not relocate within twelve (12) months or if you do not submit all of your claims for reimbursement within twelve (12) months from your hire date, you have forfeited the amount approved for relocation expenses and the offer shall be null and void.

G. Options Available for Locating and Hiring a Commercial Carrier or Truck Rental:

1. New Employee (named as “shipper”) Personally Handles the Move Either by Truck Rental or Commercial Movers

   a) Selecting a Carrier

   Under this option you are responsible for all arrangements and associated payments. The claim for reimbursement is made after the costs have been paid by you.

   The major factors to consider when selecting a commercial carrier are their cost effectiveness and reliability. Mileage rates are regulated, so only the material and labor costs can vary among carriers. The carriers will only provide an estimated cost. Make sure you are dealing with a reputable carrier who is known to have a fairly accurate estimating system. You should also inquire about any discounts the carrier offers. Some employees may be eligible for an educational discount. The educational discount can be substantial and can vary among carriers. You can contact the Senior Procurement Specialist for guidance or information that needs to be provided to the carrier to determine discount eligibility.

   b) Processing a Claim for Reimbursement:

   You are responsible for retaining all invoices, receipts or other proof of payment documentation. **THIS IS VERY IMPORTANT: Without this written documentation, processing your claim for reimbursement cannot be processed.**
You can request reimbursement for the expenses by submitting a request for reimbursement to the Accounts Payable/Receivable Supervisor. The proper forms for making claims can also be obtained from the Accounts Payable/Receivable Supervisor. This request for reimbursement can be submitted anytime after the services have been provided and you have paid for the services.

The claims for moving expenses will be reviewed by the Accounts Payable/Receivable Supervisor for compliance with the terms of this Policy. You will be notified if any costs are unallowable under the Policy and cannot be reimbursed. You will then be required to write a check to the Texas A&M Research Foundation for those costs.

The claims for travel costs allowed under this Relocation Policy will be reviewed by the Travel Branch for compliance with the terms of this Policy. The travel expense account claim form can be obtained from the ODP Travel Branch. You will be notified if any costs are unallowable under the Policy and cannot be reimbursed. You will then be required to write a check to the Texas A&M Research Foundation for those costs.

2. New Employee (shipper) Requests Assistance from the Purchasing Branch and a Purchase Order is Issued

Under this option, TAMRF/ODP selects the carrier and issues a Purchase Order. TAMRF/ODP will be responsible for paying the carrier directly for all allowable costs. However, under this option, you will be required to pay the carrier directly for any unallowable costs prior to the move. The transaction for unallowable costs is a separate transaction between you (shipper) and the moving company. When this applies, the commercial movers usually require that a COD check be given to the driver at the time of pick-up.

If you choose this option, you should contact the Senior Procurement Specialist with the specifics related to their move.

The Senior Procurement Specialist will review the invoice when received from the Carrier for compliance with the terms of the Purchase Order and this Policy. If additional unallowable charges or charges that were identified to be paid you (shipper) appear on the invoice, you will be notified and will be responsible for writing a check to the Texas A&M Research Foundation for those costs.
H. IRS Reporting:

TAMRF/ODP is required by law to report certain types of moving expenses paid to or for you as taxable income. It will be your responsibility to complete and file any required IRS forms. The TAMRF/ODP Fiscal Department can assist you with an itemized list of the costs or allowances that have been paid to you or on your behalf.

I. Contacts:

The following personnel can be contacted for questions:

Supervisor of Human Resources/Insurance Services: (979) 845-9288
Supervisor of Accounts Payable/Receivable: (979) 845-8746
Supervisor of Travel: (979) 845-0924
Senior Procurement Specialist: (979) 845-9292