

Santa Clara University Relocation Assistance

Santa Clara University is dedicated to attracting, developing, and retaining quality faculty and staff members. To accomplish this goal the University may conduct regional, national, and, in some cases, international employment searches. As a result, it may be necessary to offer – in addition to a competitive compensation and benefit package – relocation assistance for strategic hires.

This document specifies the eligibility requirements, qualified relocation expenses, amount of allowable assistance, and procedures for approving and processing relocation expense reimbursements for newly hired employees.

For further information specific to relocation assistance for faculty, please reference the Relocation Assistance for Faculty guidelines.

Eligibility for Relocation Assistance

Newly hired employees who are appointed to one of the following strategic positions may be eligible to receive relocation assistance:

- Administrative positions reporting to the President, Provost, or a Vice President (see Appendix A)
- Administrative positions reporting to an Assistant Vice President, Associate Vice President, Vice Provost, or Dean (see Appendix A)
- Head Coach Positions for national sports (men and women's basketball; men and women's soccer; baseball; and women's volleyball)
- Tenured or Tenure-Track Faculty
- Senior lecturers, renewable term lecturers, term faculty, and faculty on special appointments with the approval of the Dean and the Provost
- Librarians with the approval of the Provost

In order to qualify for reimbursement of relocation expenses, the following conditions must be met:

- The moving expenses must be incurred within one year of the starting date of the employee's appointment.
- The distance from the employee's new home to the University must not be greater than the distance from the employee's former home to the University.
- The University must be at least 50 miles farther from the employee's former home than the employee's old job location was from the employee's former home. For example, if the employee's old job location was 3 miles from the employee's former home, the University must be at least 53 miles from the employee's former home.

Amount of Relocation Assistance

The amount of relocation assistance, including the supplemental payment, provided to a newly hired faculty or staff member must be authorized by the President, Provost, or appropriate Vice President. Assistance is limited to \$10,000 for moves originating within the state of California and to \$20,000 for moves originating outside the state of California, including outside the United States.

Approval and Payment Procedures

The President, Provost, or appropriate Vice President responsible for the appointment must approve relocation assistance, including the maximum amount of assistance, for newly hired faculty and staff. The approved amount of relocation assistance is to be included in the

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candidate's offer letter, letter of appointment, or other relevant document.

Effective January 1, 2018, all employer-provided relocation expenses, including moving expenses paid directly to a third party (e.g. a moving company), must be reported as federal taxable income, subject to income tax and FICA withholding. Therefore, you will receive the relocation assistance specified in your offer letter, less applicable taxes, via payroll on your first pay day with the University. There are no limits or conditions to how you spend your relocation assistance and no specific companies, services or methods of moving that you have to follow to get your relocation assistance.

Repayment of Relocation Assistance

If an employee who has received relocation assistance does not continue employment with the University for a period of two years, the employee may be required to repay the amount received as relocation assistance. The amount of the repayment owed to the University will be prorated based on the number of months of employment.

Contact Information

Please consult with your hiring manager or Human Resources regarding questions related to your relocation assistance.

For information about potential tax implications related to relocation assistance, employees should contact the Internal Revenue Service [www.irs.gov or (800) 829-1040], the California Franchise Tax Board [www.ftb.ca.gov or (800) 852-5711], or their personal tax advisor.

*Adopted by the President's Staff
May 2007
Revised May 2018*

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**APPENDIX A
ADMINISTRATIVE POSITIONS ELIGIBLE FOR RELOCATION ASSISTANCE**

Administrative positions reporting to the President, Provost, or a Vice President

Deans
Vice Provosts
Director, Athletics and Recreation
Associate Vice President, Finance
Assistant Vice President, Human Resources
Assistant Vice President, University Operations
Chief Investment Officer
Director, Administrative Services
Director, Auxiliary Services
Associate Vice President, Marketing and Communications
Assistant Vice President, Development
Executive Director, Alumni Relations
Director, Planned Giving
University General Counsel
Executive Assistant to the President
Director, Campus Ministry
Executive Director, Ignatian Center
Dean of Admissions
Dean of University Financial Aid Services

Administrative positions reporting to an Associate/Assistant Vice President, Vice Provost, or Dean

Associate Vice Provosts
Assistant Vice Provosts
Associate Provosts
Senior Assistant Deans, College and Schools
Assistant Deans, College and Schools
Executive Director, Markkula Center
Executive Director, Center for Science, Technology, and Society
Associate Directors, Centers of Distinction
Director, de Saisset Museum
Director, Institutional Research
Director, Sponsored Projects
Director, Center for Multicultural Learning
The University Librarian, Orradre Library
The University Librarian, Heafey Law Library
Director, Media Services
Director, Information Technology
Senior Associate Athletic Director
University Registrar
Associate Dean, Student Life
Dean, Academic Support Services (Drahmann Center)
Director, Center for Student Leadership
Director, Health and Counseling Services
Director, Career Center

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APPENDIX A

ADMINISTRATIVE POSITIONS ELIGIBLE FOR RELOCATION ASSISTANCE

Administrative positions reporting to an Associate/Assistant Vice President, Vice Provost, or Dean (continued)

Director, University Events
Director, Residence Life
University Controller
University Budget Director
Director of Benefits, Compensation, and Payroll
Assistant Director, Human Resources
EEO/Diversity Specialist
Director, Facilities
Director Campus Safety Services
Director, Planning & Projects
Director, Media Relations
Creative Director
Marketing Director
Director, Major Gifts
Director, Annual and Special Gifts
Director, Advancement Services
Director, Corporate and Foundation Relations

*Adopted by the President's Staff
May, 2007
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