



Board Policy No. 226 **Relocation Policy**

ADOPTED: 7/27/16

RECENT AMENDMENT: N/A

SEE ALSO: 225, 226A

SUBJECT CATEGORY: SECTION 200, HUMAN RESOURCES

SUBSECTION: BENEFITS

CONTROL DEPARTMENT: FINANCE/HUMAN RESOURCES

I. PURPOSE

The purpose of this policy is to provide one-time financial assistance toward actual, reasonable and necessary relocation expenses for individuals who are recruited for certain management positions. This policy grants authority to the General Manager and establishes limitations and financial caps on the reimbursement of relocation expenses. Any exceptions to this policy shall be approved by the Board.

II. PERSONS AFFECTED

This policy is applicable to those positions identified herein that are hired as full-time, regular District employees and only when expenses are included as a formal and specific component of the original offer of employment made to a qualified applicant by the District. Persons residing within the nine-county Bay Area Region shall not be eligible for reimbursement of relocation expenses.

III. POLICY

A. Limitations

Reimbursement shall not be provided for the following:

- Any part of purchase price for a new home;
- Expense of obtaining or terminating a lease; and
- Loss on sale of home.

B. Financial Cap

Reimbursement for relocation expenses shall not exceed \$10,000, unless an exception is authorized by not less than four affirmative votes of the Board. Notwithstanding the limitations provided in Section III, only those documented expenses identified in [IRS Publication 521](#) shall be eligible for reimbursement, subject to applicable tax withholding and reporting. Employees shall be eligible for reimbursement of expenses incurred from the date of offer, but not later than six months after the date they begin employment. Employees who leave employment within twelve (12) months from the date relocation is complete shall reimburse the District in full unless terminated by the District.

IV. AUTHORITY

A. General Manager's Authority

In order to competitively recruit individuals with highly desirable skills, the General Manager is authorized to reimburse relocation expenses consistent with this policy for new hires within the following groups of management employees:

- Executives (Chiefs and Executive Directors)
- Department Directors
- Assistant Directors

For Manager-level positions that are difficult to recruit and require an expertise not readily available on the open market, the General Manager shall return to the Board for approval prior to any relocation expense offer.

The General Manager shall enact an Administrative Regulation that provides procedures for processing and reporting relocation expense reimbursements.