

Policy Update

Relocation Allowance

Presentation for Business Process Forum

October 2024

Relocation Allowance Policy Overview

Goal

- Support recruitment strategies
- Defray a portion of employee's costs

Authority

- Currently Controller's Unit, to be University Human Resources
- Hiring unit, budget authority

Compliance

- 100% taxable
- Paid after hired

Eligibility

- Employee appointment type
- Relocating
- Remain at OSU 1 year minimum

Amount

- Guidelines by distance of move

Focus on Areas of Updates

- One great question from a partner led to additional questions which led to these updates as a bridge to future updates.

1.1. To attract top candidates during the recruitment process, a hiring manager may offer a relocation allowance. This allowance is not intended to cover the full cost of a move to the vicinity of an Oregon State University site, but rather to defray a portion of the cost to relocate to a new place of employment. However, specific allowance amounts may reflect the competitive environment of particular hires.

~~3.1.1.~~ **3.1.2.** To be eligible for a relocation allowance, the new employee is expected to work for the university at least one (1) year. If the employee voluntarily separates from the university prior to meeting the required length of service, the university may take action to recover the relocation allowance.

3.1.3. If the employee does not relocate as agreed within one (1) year, the university may take action to recover the relocation allowance.

Additional Area of Update

3.1.2.3.1.4. Following are general guidelines to assist the hiring unit in determining the amount of a relocation allowance to offer, based on distance from employee's current home to the new work location:

- For relocation outside the local area and within 300 miles:
 - ~~Up to \$1,500 for classified staff~~
 - ~~Up to \$3,500 for professional/fixed term faculty~~
 - ~~Up to \$5,000 for tenured/tenure track faculty~~
 - Up to \$5,000 for relocation outside the local area and within 300 miles.
- For relocation greater than 300 miles, within the Continental United States:
 - ~~Up to \$2,000 for classified staff~~
 - ~~Up to \$6,500 for professional/fixed term faculty~~
 - ~~Up to \$8,000 for tenured/tenure track faculty~~
 - Up to \$8,000 for relocation greater than 300 miles, within the continental United States.
- For international and non-continental U.S. relocation:
 - ~~Up to \$3,000 for classified staff~~
 - ~~Up to \$10,000 for professional/fixed term faculty~~
 - ~~Up to \$12,000 for tenured/tenure track faculty~~
 - Up to \$12,000 for international and non-continental U.S. relocation.

Focus on Areas of Updates

- Policy steward changing to UHR
 - Supports recruitment function and employee experience
 - May become part of umbrella policy about supplemental payments
- Guidelines on amounts changing to distance-based
 - Aligning with DEI and Prosperity Widely Shared by eliminating implications of value
- Eligibility inclusive language
 - “only” and “not” are problematic

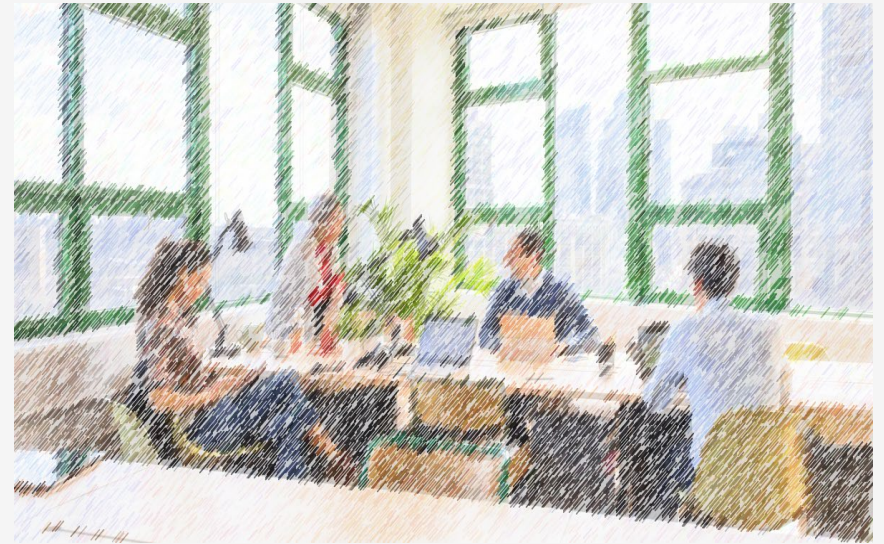
Reviewing Policy with an Equity Lens

OSU Office of Institutional Diversity

- Jeff Kenney, AVP Organizational Learning & Development
- DEI guidance for policy and standards: Advancing Access, Belonging and Success

OSU main page search prompt:
"access belonging success guidance"

https://diversity.oregonstate.edu/sites/diversity.oregonstate.edu/files/access_belonging_success_-_research_guidance.pdf



Reviewing Policy with an Equity Lens

Commitments	Goals
<p>Access</p> <p><i>Establish policies that remove barriers and build pathways to achieve full participation in the university and its operations.</i></p>	Policies mitigate barriers to entry or full participation.
	Policies redress disparities associated with social and cultural capital.
	Policies attend to barriers through systemic and macro perspectives.

<p>Belonging</p> <p><i>Establish policies that enable the realization of a pluralistic university community that negotiates and reflects shared values.</i></p>	Policies cultivate affirming conditions.
	Policies mitigate marginalizing conditions.
	Policies contribute to shared mission, vision and values.

<p>Success</p> <p><i>Establish policies that ensure each of us have the resources and experiences we need to realize excellence.</i></p>	Policies enable flexibility and responsiveness in professional practice.
	Policies account for and empower diverse notions of success.
	Policies facilitate equitable distribution of resources.

Learning Opportunity

Controller's Unit Policy Program Training

Learn how to:
navigate the CU Policy Program website,
access policies and resources,
submit a policy request & stay informed

Thursday, October 10th

9-10am

via Zoom



The Take-Aways

Controller's Unit Policy Program

<https://fa.oregonstate.edu/fiscal-program>

Office of Institutional Diversity

https://diversity.oregonstate.edu/sites/diversity.oregonstate.edu/files/access_belonging_success_-_research_guidance.pdf

Prosperity Widely Shared

<https://leadership.oregonstate.edu/provost/strategic-plan>

