

Lincoln University

Policy:	Relocation Policy
Policy Number:	HRM-141
Effective Date:	February 2026
Revisions:	N/A
Next Review Date:	August 2027
Review Officer(s):	Vice President for Human Resources, Comptroller, Associate Provost for Faculty Affairs, and General Counsel & Secretary to the Board of Trustees
Status:	Approved by the President and LU Board of Trustees

1. Purpose

To establish clear, equitable, and fiscally responsible guidelines for employee relocation support offered to specific newly hired faculty and senior administrative leadership. This policy outlines eligibility, mandatory approval workflows, and spending parameters to ensure compliance with the University budget and tax reporting requirements.

Relocation assistance does not alter the at-will nature of employment, nor does it guarantee continued employment for any period of time.

2. Scope and Eligibility

Relocation assistance is not an entitlement and is strictly limited to the following categories of new hires:

- **Faculty:** Tenured and Tenure-Track Faculty appointments.
- **Senior Administration:** Vice Presidents, Chief of Staff, and Associate Vice Presidents.
- **Director-Level Positions:** May be considered on a case-by-case basis only when there is a demonstrated urgency or specialized recruitment need.

Exclusions: Temporary or short-term assignments (less than 90 days) and standard staff positions are not eligible for relocation. Relocation assistance is only considered for moves exceeding 50 miles.

3. Required Approval Workflow

Crucial: No relocation assistance may be discussed with the preferred candidate until all preliminary approvals are secured in writing.

Position Level	Required Primary Approval	Required Secondary Approval	Mandatory Review
Tenured and Tenure-Track Faculty	Provost	Hiring Department Head	HR & VP Finance/Admin
Senior Admin (VP, Chief of Staff, AVP)	President	N/A	HR & VP Finance/Admin
Director Level	President	Division Leader and Department Leader	HR & VP Finance/Admin

Note: Any commitment exceeding \$7,500 requires additional written approval from the Vice President for Finance/CFO and either the Provost (for faculty) or President (for senior executives). Commitments above the Board-level threshold must be reported to the Board of Trustees. “*Board-level threshold*” refers to any relocation commitment that exceeds the approval authority delegated by the Board of Trustees under applicable University bylaws or resolutions.

No University officer, employee, or agent other than those expressly identified in this policy has authority to approve, negotiate, or commit the University to relocation assistance. Unauthorized commitments are void and will not be honored.

Right-to-Know Law (RTKL) and Transparency Statement

Relocation assistance decisions are governed by objective eligibility criteria, documented approval requirements, and standardized financial limits set forth in this policy. Records related to relocation approvals and reimbursements constitute administrative records maintained in the ordinary course of university business and are subject to applicable disclosure, retention, and redaction requirements under Pennsylvania’s Right-to-Know Law. The University applies this policy consistently to similarly situated positions to ensure transparency, fiscal accountability, and

compliance with state-related institutional reporting obligations and public stewardship mandates.

4. Financial Parameters and Timeline

For approved tenured and tenure-track faculty and administrative positions eligible under this policy, the hiring department is responsible for budgeting, funding, and processing the reimbursement of all eligible relocation costs.

The maximum standard reimbursement for eligible administrative positions is capped at \$7,500.

- **Relocation Timeline:** The relocation must take place within 60 days of the employee's start date.
- **Mileage Formula:** Reimbursement is calculated based on the distance of the move:
 - **≤ 1,000 miles:** Up to \$2,000
 - **≤ 1,500 miles:** Up to \$2,500
 - **≤ 2,000 miles:** Up to \$3,000
 - **≤ 2,500 miles:** Up to \$3,500
 - **≤ 3,000 miles:** Up to \$4,000

This policy is designed to align with federal and state regulations regarding relocation assistance for approved faculty hires. Please note that reimbursement amounts for approved staff positions are outlined above in this section.

5. Reimbursement Procedure

Relocation expenses are paid as a reimbursable expense after costs are incurred.

- **Documentation:** Employees must submit all original expense receipts to the hiring department's designated Office Administrator.
- **Submission Deadline:** Receipts must be submitted within 30 days of the relocation date to process the reimbursement.
- **Eligible Expenses:** Includes household goods shipment, packing, and travel for the employee and family.

- **Ineligible Expenses:** Includes personal expenses or costs not directly related to the relocation of the employee's household goods or required travel.

6. Tax Treatment

In accordance with federal law, employer-paid moving expenses are **taxable income** and must be reported as compensation on the employee's Form W-2. Departments must budget for the associated employer and employee tax implications.

All relocation approvals and reimbursement documentation shall be retained in accordance with the University's records retention policy and may be subject to audit.

The University does not provide tax gross-ups or additional compensation to offset the taxability of relocation benefits unless expressly approved in writing by the President and Vice President for Finance/CFO.

7. Repayment Obligation

If an employee voluntarily resigns or is terminated for cause within twelve (12) months of the start date, the University reserves the right to require repayment of relocation assistance on a prorated basis, unless waived in writing by the President or designee.

8. Presidential Discretion

The President maintains final authority to approve, deny, or modify relocation assistance on a case-by-case basis. This includes, but is not limited to, adjusting maximum reimbursement caps, or extending eligibility timeframes when deemed in the best interest of the University's strategic recruitment or operational needs.

9. Appeals Process

An employee or hiring department may appeal the application of any provision within this policy directly to the President. Such appeals must be submitted in writing and include a business justification for the requested exception.

10. Finality of Decisions

Decisions made by the President regarding relocation assistance, exceptions, or appeals are final and binding. Any modifications granted under this section do not constitute a permanent change to the general policy or create a precedent for future hires.

Lincoln University reserves the right to amend or revoke its policies at any time. The policies found on this Web site are not conditions of employment and do not create a contract between the University and its employees.