



## ADMINISTRATIVE POLICY 4-9:

# Policy for Relocation Incentives and Reimbursement Expenses for Management and Unrepresented New Hires

Approved: Board of Supervisors

Authority: County Administrator

Resolution: 07-0760

Revised Date: 9/11/07

---

## I. Purpose

To establish criteria and approval authority for the authorization of certain relocation incentives and reimbursement of relocation expenses associated with the hiring of new employees in selected management and unrepresented positions.

## II. Policy

Certain relocation incentives may be authorized and/or moving expenses may be reimbursed by County departments for department heads, assistant department heads, management classification, or difficult-to-fill unrepresented positions that fulfill a critical need in the County organization. The policy is limited to new hires not already employed by the County of Sonoma. The County Administrator as designee shall review, and if acceptable, authorize any incentives or reimbursements under this policy. A difficult-to-fill position is defined as a position where Human Resources had conducted aggressive recruiting efforts and the results of the effort indicate that the candidate pool is limited and the offering of relocation incentives may be a key factor in acquiring a viable candidate.

Costs of the relocation incentives/reimbursements will be borne by the hiring department.

### A. Moving Expenses

1. Relocated employees will be reimbursed for reasonable and actual moving expenses according to the following:
  - a. The County of Sonoma agrees to reimburse the employee for the cost of moving normal household items and full value insurance protection from origin to destination.
  - b. The County of Sonoma will authorize the reimbursement after receiving three estimates from the candidate; County of Sonoma will reimburse the lowest of the three estimates.
  - c. Applicable receipts will be required prior to authorization and the claim for reimbursement shall follow the County Auditor's standard claim procedures.
2. The following are required to be eligible for reimbursement:
  - a. The new hire must not be a current Sonoma County employee.
  - b. The distance between the new hire's old residence and their new place of work must be at least 50 miles greater than the distance between the old home and the old place of work.
  - c. The new place of residence is within the geographic boundaries of Sonoma County or within a commutable distance of the counties immediately adjacent to Sonoma County.

3. Some examples of moving expenses not authorized by this policy:
  - a. Special services such as maid service, carpet service, disassembly of unusual articles
  - b. Transportation of vehicles, camping or utility trailers, building materials, firewood, landscape materials, animals, boats, or items not considered to be normal household items
  - c. Visits to the new location to secure housing
  - d. Storage costs at destination
  - e. Temporary living expenses at destination
  - f. Costs associated with the sale or purchase of residences, or forfeiture of deposit, penalty, etc. as a result of breaking or terminating a lease/agreement

4. Terms of Agreement:

- a. The parties shall enter into an agreement that shall include the following:
  - 1) The employee shall be required to repay 100% of the reimbursed amounts if the employee voluntarily terminates employment within 24 months from the date of hire.
  - 2) If the employee is terminated from employment for any reason other than reasonable cause, no repayment will be required; if the employee is terminated for cause (as defined in Civil Service Rule 10, Section 10.3, A), repayment will be required according to item 4(a) above.
  - 3) The County of Sonoma shall not reimburse for any other moving expenses not listed in the agreed upon moving estimate.
  - 4) The parties agree that the employee reimbursement as described above shall be repaid to the County of Sonoma within 30 days of separation.
- b. Reimbursement of the expenses defined in item 1) are usually considered qualified expenses per current IRS regulations and are not subject to tax withholding and will be processed as reimbursements per the County's standard claim procedures. Employees are encouraged to check with a tax accountant if they have any questions on what relocation expenses may be listed as deductions in personal income statements.
- c. Employees will be responsible for all expenses not listed above that relate to relocating to the new job location.

B. Advancement of Vacation and Sick Leave Hours upon Hire

New hires, meeting the criteria as stated above and with the approval of the County Administrator or his/her designee may be granted up to two weeks of vacation and/or two weeks of sick leave for department heads or assistant department heads, 24 hours of vacation and/or 24 hours of sick leave for the balance of management/unrepresented employees upon employment. Upon receiving approval, departments must ensure that the agreed upon number of hours has been documented in the new hire's job offer letter and a copy is retained in the employee's personnel file.

### **III. Procedure**

#### **A. Request for Approval**

The Department Head shall complete the Relocation Incentives and Reimbursement Expenses Request Form and provide to the County Administrator for review and approval. Prior to any formal offer of incentives or reimbursement, departments must have approval from the County Administrator.

#### **B. Moving Expenses**

For reimbursement for relocation expenses, the Relocation Agreement Form shall be executed by the employee and County Administrator, or the department head, if so designated, prior to the employee's first day of employment and prior to any approval of expenses. Departments must retain the original copy of the executed form in the employee's personnel file. A Reimbursement Request Form, a copy of the executed Relocation Agreement Form, and a copy of the Relocation Incentives and Reimbursement Expenses Request Form needs to be attached to accompanying receipts and provided to the Auditor/Controller for processing.

Human Resources recommends the Relocation Agreement Form be used in conjunction with the offer of employment letter.

#### **C. Advancement of Vacation and Sick Leave Hours upon Hire**

Department Heads should instruct department payroll staff to complete a Leave Adjustment Form. The Leave Adjustment Form and a copy of the Relocation Incentives and Reimbursement Expenses Request Form approved by the County Administrator should be provided to the Auditor/Controller payroll division for processing.

Human Resources recommends the Relocation Agreement Form be used in conjunction with the offer of employment letter. Copies of the Relocation Incentives and Reimbursement Expenses Request Form and Relocation Agreement Form can be found on the Human Resources Department Intranet site.

### **IV. Interpretation**

Questions on policy interpretation, application, or variations will be resolved by the County Administrator or his/her designee.