



# SLAC RELOCATION ASSISTANCE POLICY ADDENDUM

## Document Approval (signature/date)

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## 1. PURPOSE

SLAC National Accelerator Laboratory (SLAC) may provide relocation assistance by reimbursing the relocation expenses of eligible employees for their permanent relocation to a new work location. A permanent relocation is when an employee is assigned to a new work location for a minimum of 12 months. This Addendum outlines requirements for SLAC concerning the [Fly America Act](#), restrictions on allowable reimbursements, and the reimbursement process that are not specifically addressed in the [Stanford Administrative Guide 2.1.19 Relocation of Faculty and Staff](#) policy.

## 2. APPLICABILITY

This policy addendum applies to new and current SLAC faculty and staff, except those covered by the collective bargaining agreement.

## 3. POLICY ADDENDUM STATEMENT

The provisions of this policy addendum are intended to provide flexibility in the recruitment and hiring of highly qualified staff, through reimbursement of their relocation expenses when relocation is required to perform their duties. New employees who are to be employed by SLAC or current staff are eligible for reimbursement of their relocation expenses.

Departments may set a maximum reimbursable amount on relocation expenses as stated in the offer letter. This policy is administered by the Human Resources Director or their designee, in accordance with Stanford University and DOE policies and guidelines.

Items not specifically addressed in this policy will not be considered for relocation reimbursement.

## 4. TAX IMPLICATIONS

As of the date of this policy, the Internal Revenue Service (IRS) requires SLAC to report any payments and reimbursements associated with the move of the employee, the employee's immediate family, and their household goods and personal effects as additional compensation income to the employee, subject to payroll taxes. Tax exemptions may be available for state taxes depending on applicable law. Tax laws may change, and employees should review the latest guidance or speak with a tax advisor.

## 5. ELIGIBILITY

Relocation assistance should be offered only when (1) relocation is required to perform duties; and (2) SLAC feels that payment of part or all of relocation expenses is a significant factor in being able to attract a potential employee to SLAC/Stanford, or in being able to attract an employee to accept a temporary reassignment. Eligibility for relocation allowances does not establish an entitlement. Payment of relocation expenses to an eligible person is at the discretion of the hiring unit.

## 5.1 SLAC Employees

Employees eligible for federally taxable moving reimbursements and advances per IRS guidelines (see section 4) include:

- New full-time employees whose new SLAC job location is at least 50 miles farther from their former home than their old job location was from their former home. New hires relocating to SLAC are expected to abide by both SLAC's Relocation Assistance Policy and [SLAC's Travel and Expense Policy](#).
- Current full-time employees temporarily reassigned to a location 50 or more miles away. If such a reassignment is for less than a year, it is a business expense and not tax reportable.

Exceptions to the eligibility criteria may be made by the appropriate Senior Management team member, or designee, in consultation with Finance and Human Resources.

## 5.2 Spouses/Same-Sex Domestic Partners and Dependents

Relocation costs for spouses/same-sex domestic partners and dependents are reimbursable to the extent described in this Policy.

*Tax Note:* Domestic partner expense reimbursements are tax-reportable to the employee.

## 6. RESPONSIBILITY

### 6.1 Travelers

Those covered by this policy may make transportation arrangements for themselves, their spouse/same-sex domestic partners, their dependent children living at home, and their personal household items. Unless there are unusual circumstances, in the case of a two-hire move (an employee and spouse / same sex domestic partner) relocation will be offered to one person and not both.

### 6.2 Airfare

All airfare purchases for SLAC Relocation travel should be at the Lowest Logical Airfare and should be the most direct route for the employee and dependents, regardless of the mode of transportation. Reimbursement of relocation costs can include either mileage or airfare. For one-way relocation travel, travelers may purchase a round-trip flight if it is cheaper than a one-way airfare. For documentation, a printout of the one-way airfare itinerary must be included in the relocation expense report.

### 6.3 Fly America Act

SLAC is required by contract to comply with the [Fly America Act](#), which states that only U.S. flag carriers shall be used by travelers on authorized SLAC business. Please refer to 5.6 of [SLAC's Travel and Expense Policy](#) for further guidance.

## 7. PROCEDURE

### 7.1 Moving Companies & Transporting Household Items

- 7.1.1. SLAC has direct-bill moving company vendors. If a new employee chooses to use one of the direct-bill vendors, they may contact the direct-bill moving companies directly to obtain an estimate. A list of direct-bill moving company vendors can be found on the [Relocating to SLAC](#) webpage. Submit the direct bill estimate to [travel@slac.stanford.edu](mailto:travel@slac.stanford.edu) for approval prior to the move to have the expenses directly billed to SLAC. New employees may choose to use an alternative moving company. If so, expenses will be paid out-of-pocket, and the itemized receipt must be submitted for reimbursement in Concur. Prior approval is not required for this option.
- 7.1.2. All or part of the actual and reasonable expenses of moving the household and personal effects of a new employee may be reimbursed. Unless there are unusual circumstances, a reasonable weight allowance is 15,000 pounds. No reimbursement will be made for shipping animals (other than household pets); boats; airplanes; vacation trailers; recreational vehicles; canned, frozen, and bulk foodstuffs; building supplies; plants; storage sheds; farm equipment; or firewood.
- 7.1.3. The reimbursable cost of insurance for household and personal items during shipping is "all risk" replacement cost insurance, which should be arranged through the shipping agent or carrier. Insurance costs for household and personal items during shipping are a reimbursable expense.
- 7.1.4. The actual cost of packing, unpacking, crating, and uncrating personal and household items is allowed within the agreed weight allowance.
- 7.1.5. The cost of moving goods to and from storage is allowed subject to the weight allowances in section 7.1.2 in this policy. Storage is limited to 60 days.
- 7.1.6. Reasonable costs of disconnecting and connecting household equipment are reimbursable.

### 7.2. Shipping of Automobile

- 7.2.1 If the employee chooses to ship their automobile, then the most economical means for shipping must be used, which may include the household goods moving vendor. However, it is not required to use the same vendor. The maximum number of automobiles for which SLAC will reimburse shipment is two.

## 8. HOUSE-HUNTING EXPENSES

In some cases, when specifically noted in the offer letter, all or part of the expenses associated with a trip to SLAC for the purposes of house-hunting may be reimbursed to a prospective employee. Generally, these may include those expenses reimbursed for travel

by SLAC Employees ([SLAC Travel and Expense Policy](#)), except that the per diem method may not be used. The house hunting expenses may include, if authorized, the following:

- Expenses related to bringing a spouse/domestic partner
- Expenses for necessary childcare

Reimbursement for house-hunting expenses does not apply to dependents other than to spouse/domestic partner.

Note: All house-hunting expenses are tax-reportable.

## 9. EN ROUTE/ TRAVEL EXPENSES

### 9.1 Ground Transportation & Mileage Reimbursement

9.1.1. If the employee chooses to drive their personal automobile en-route to the destination, the employee is expected to maintain an average of 400 miles per day on trips of more than one day, except when prevented from doing so by circumstances beyond the employee’s control.

9.1.2. Mileage reimbursement will be paid at the relocation rate provided on the [GSA website](#) plus road and bridge tolls, if any, based on the actual driving distance by the most direct route for relocation to the SLAC area. Personal side trips will not be reimbursed. Miles should be calculated using an online mapping tool, such as Google maps. Please retain and submit mileage calculations for reimbursement.

9.1.3. Reasonable reimbursement will be made for the cost of transportation to and from air, rail, or boat terminals.

9.1.4. Tips of a reasonable amount are allowed but are not to exceed 20% of the charge.

## 10. EN ROUTE LODGING, MEALS, AND GRATUITIES

### 10.1 Reimbursement

10.1.1. Actual reimbursement will be consistent with rates published in the Stanford Administrative Guide Memo, 5.4.2 and the Federal Travel Regulations. You can use these links to find the current [domestic](#), [international](#), [Alaska and Hawaii](#) per diem rates. The per diem rate is based off of the zip code of the new hire’s lodging location.

Household Member	Lodging Per Diem	M&IE Per diem (75% on first day of travel)
Employee	100%	100%
Spouse / Domestic Partner	50%	50%
Dependent	25%	25%

**11. TEMPORARY LIVING EXPENSES**

**11.1 Lodging, Meals & Incidentals (M&IE)**

11.1.1. After arriving at SLAC, and while searching for permanent living quarters, a new hire/employee, spouse/same sex domestic partner and dependent children living at home are eligible for reimbursement for reimbursement consistent with rates published in the Stanford Administrative Guide Memo, 5.4.2 and the Federal Travel Regulations. You can use these links to find the current [domestic](#), [international](#), [Alaska and Hawaii](#) per diem rates. The reimbursement rates are based on the lodging location.

Household Member	Lodging Per Diem	M&IE Per diem (75% on first day of travel)
Employee	100%	100%
Spouse / Domestic Partner	50%	50%
Dependent	25%	25%

11.1.2. The reasonable period for which this allowance will be given is up to 21 consecutive days. Meals and Incidental expenses will be reimbursed for the same dates as Lodging. This period may be extended if determined necessary and reasonable by the SLAC senior management team. M&IE reimbursements are permitted without lodging receipts if a new hire is staying with family members or friends. New employees will be asked to provide a signed statement in lieu of a receipt outlining the dates, relationship, and address of the temporary accommodation.

**12. CAR RENTALS AND INSURANCE**

12.1 SLAC can reimburse rental car expenses for up to 21 days for a “standard” car rental. Rental car insurance coverage is an allowable expense if the new hire is not covered through their own auto insurance.

**13. REIMBURSEMENT PROCEDURE**

13.1 A new hire/employee is expected to pay for relocation expenses and submit a relocation expense report in Concur for reimbursement after reporting to work. If using the approved [SLAC moving vendors](#), those expenses will be directly billed to SLAC.

13.2 After reporting to work, a new employee claiming reimbursement must present original itemized receipts (receipts for meals are not required) and complete a Relocation Expense Report in SLAC’s Concur system for all expenses claimed. An

itemized receipt showing proof of payment is required for all expenses of \$75 or more.

- 13.3 The relocation reimbursements must be submitted using the expense report in Concur. The expense report must be submitted within 60 days of the last expense incurred for relocation. Relocation must be completed within one year of service date at SLAC.

#### **14. REPAYMENT PROVISIONS**

- 14.1 Consistent with applicable law, employees who receive Relocation Assistance to accept a regular, full-time position will be required to reimburse SLAC for the Relocation Assistance if they voluntarily leave SLAC for any reason within twelve months from their date of hire at SLAC. Reimbursement to SLAC will be required based on the repayment terms included on the Relocation Agreement.

#### **15. DOCUMENTS AND RECORDS**

- [Stanford Admin Guide 2.1.19 Relocation of Faculty and Staff](#)
- [FAR 52.247-63 Preference for U.S. Flag Air Carriers, Fly America Act](#)
- [DOE Order 550.1 Official Travel](#)
- [Stanford University Administrative Guide Memo 8.4.2, Vehicle Use](#)
- [Internal Revenue Service Mileage Rates](#)
- [General Services Administration \(GSA\), Per Diem Rates](#)
- [Concur Quick Start Guides](#)

#### **16. DEFINITIONS AND ACRONYMS**

**CAM:** SLAC Cost Account Manager oversees costs charged to specific projects.

**DOE:** U.S. Department of Energy.

**Fly America Act:** Travelers are required by [FAR 52.247-63](#) to use a U.S. flag air carrier service for all air travel funded by the U.S. Government.

**Lowest Logical Airfare (LLA):** The LLA is the least expensive, non-refundable fare with the minimum number of stops at the time of booking.

**M&IE:** Meals and Incidental Expenses.

**Per Diem:** Daily allowance for meals and incidental expenses as set by the U.S. GSA (General Services Administration).

**Dependent:** Immediate family member of the new employee.

**Domestic Partner** refers to a person in a domestic partnership with the SLAC new employee. A domestic partnership is defined, for the purposes of this procedure, as a committed relationship between two adults of the same sex or opposite sex who:

- a) are each other's sole domestic partner and intend to remain so indefinitely,
- b) maintain a common residence and intend to continue doing so (or would maintain a common residence but for an assignment abroad or other employment-related, financial, or similar obstacle),
- c) are at least 18 years of age and mentally competent to consent to a contract,
- d) share significant responsibility for a significant measure of each other's financial obligations,
- e) are not married or joined in a civil union to anyone else,
- f) are not a domestic partner of anyone else,
- g) are not related in a way that would prohibit legal marriage in the U.S. jurisdiction in which the partnership was formed.