

January 25, 2016

MEMORANDUM

TO: Kalbert Young
Vice President for Budget and Finance/CFO

VIA: Robert Bley-Vroman
Interim Chancellor

VIA: Reed Dasenbrock
Vice Chancellor for Academic Affairs

FROM: John Doe
Dean

SUBJECT: Request Approval for Excess Relocation Allowance Pursuant to AP A8.863, Section 5.b. and Request Approval for Exceptions to the Allowable Relocation Expenses Pursuant to AP A8.863, Sections 5.c. and 5.d. for Dr. Jane Smith

SPECIFIC ACTION REQUESTED:

Approval is requested for the following relocation exceptions for Dr. Jane Smith, Associate Professor in the Department of XYZ:

- Relocation allowance of \$14,000 (A8.863, Section 5.b.)
- Car rental in Hawaii after the day of arrival until personal vehicle is received (A8.863, Section 5.c.)
- Temporary housing in Hawaii after the day of arrival not to exceed two weeks at a rate not to exceed the federal allowable lodging rate for Honolulu (A8.863, Section 5.c.)
- Issuance of purchase order to vendor on behalf of the appointee for shipping costs (A8.863, Section 5.c.)
- Car rental in Seattle (former home) for three days after shipping personal vehicle (A8.863, Section 5.d.)

RECOMMENDED EFFECTIVE DATE:

Upon your approval.

ADDITIONAL COST:

Existing College of ABC resources will be utilized; therefore, no additional funds are requested. The source of funds for this relocation allowance will be TFSF and/or RTRF funds.

PURPOSE:

The requested excess relocation allowance and relocation exceptions will facilitate the relocation of Dr. Smith and her family from Seattle to Honolulu.

Dr. Smith was selected in December 2015 as the best candidate for the position of Associate Professor in the Department of XYZ. In addition to teaching courses in the XYZ curriculum, Dr. Smith will develop and maintain an active and productive research program. Dr. Smith is an internationally recognized expert in the field of XYZ and is currently employed as an Associate Professor at the University of ABC.

BACKGROUND:

Pursuant to AP A8.863, Section 5.b., authorization to approve relocation allowances in excess of \$8,000 is delegated to the Chancellor. Based on initial estimates, Dr. Smith's relocation expenses will total approximately \$14,000.

Pursuant to AP A8.863, Section 5.c., authorization to approve car rental and temporary housing in Hawaii after the day of arrival and the issuance of purchase orders to vendors on behalf of the appointee is delegated to the Chancellor. Dr. Smith will require a rental car while waiting for her personal vehicle to arrive from the mainland. She will also require temporary housing while she searches for an apartment. Further, Dr. Smith has requested that a purchase order be issued for the shipping of her personal and professional materials since the shipping cost is estimated to exceed \$10,000.

Pursuant to AP A8.863, Section 5.d., authorization to approve car rental at the appointee's former home is delegated to the Vice President for Budget and Finance/CFO. Dr. Smith will require a rental car in Seattle after she ships her personal vehicle to Honolulu.

The selection of Dr. Smith was the result of an intensive search during which she emerged as the most qualified candidate for the position of Associate Professor in the Department of XYZ. The excess and exception requests are necessary to attract Dr. Smith to Hawaii and there is no other equally qualified and acceptable candidate that could be attracted without an exception. The total relocation claim will not exceed the actual cost of relocation as determined by the submission of suitable documentation.

ACTION RECOMMENDED:

We recommend approval of the following relocation exceptions for Dr. Jane Smith, Associate Professor in the Department of XYZ:

- Relocation allowance of \$14,000 (A8.863, Section 5.b.)
- Car rental in Hawaii after the day of arrival until personal vehicle is received (A8.863, Section 5.c.)
- Temporary housing in Hawaii after the day of arrival not to exceed two weeks at a rate not to exceed the federal allowable lodging rate for Honolulu (A8.863, Section 5.c.)
- Issuance of purchase order to vendor on behalf of the appointee for shipping costs (A8.863, Section 5.c.)
- Car rental in Seattle (former home) for three days after shipping personal vehicle (A8.863, Section 5.d.)

Attachment(s)

APPROVED/DISAPPROVED

EXCESS and EXCEPTIONS PURSUANT to A8.863, Sections 5.b. and 5.c.

Robert Bley-Vroman
Interim Chancellor

Date

APPROVED/DISAPPROVED

EXCEPTIONS PURSUANT to A8.863, Section 5.d.

Kalbert Young
Vice President for Budget and Finance/CFO

Date