

Allowable Expenses Related to Interviews or Relocations

Policy

It is the intent of California Institute for Regenerative Medicine (CIRM) to recruit and hire the best possible personnel. In order to facilitate recruiting, the reasonable actual costs related to interviewing for CIRM positions and relocating to accept employment can be reimbursed if approved in advance by the President of CIRM.

Interviews

CIRM may reimburse the following actual travel expenses related to attending an interview:

The cost of transportation to and from the interview using the lowest cost alternative: airline (coach only), train (coach only) or rental or personal car (\$.485/mile). In addition, the actual cost of taxis to and from the airport or train station and the actual cost of parking and tolls are allowed. Transportation services (e.g., private car and driver) will not be reimbursed.

The cost of lodging and meals may be reimbursed in accordance with the reimbursement rules for ICOC members and CIRM staff.

Approval must be obtained from the President prior to making a commitment to the interviewee to pay such expenses (a suggested format is attached). When the trip is over, the interviewee should file a claim using STD 262 (Travel Expense Claim). Receipts for all items except meals and transportation costs of less than \$5.00 must be attached. Also, a copy of the prior approval by the President must be attached to the claim. A "fill and print" version of STD 262 is available on the CIRM web site.

Relocations

CIRM may reimburse the following actual non-taxable travel expenses related to relocation by a new employee to accept a position with CIRM or relocation by an existing CIRM employee in order to continue employment with CIRM:

- The cost of transportation for the new/relocated employee and members of the employee's household from the current residence to the new residence using the lowest cost alternative: airline (coach only), train (coach only) or rental or personal car (\$.22/mile). In addition, the actual cost of a taxi ride from the airport to the new residence or CIRM headquarters, tolls and parking during the relocation may also be reimbursed. Transportation services (e.g., private car and driver) are not allowed.

- The costs of lodging (but not meals) for the new/relocated employee and members of the employee's household during the relocation from the individual's current residence to the new residence may be reimbursed in accordance with the reimbursement rules for ICOC members and CIRM staff.
- The actual costs incurred for packing, insurance, transportation, storage fees (not to exceed 30 calendar days), transporting items to and from storage, unpacking and installation of the individual's household effects at the new residence may also be reimbursed.

Relocation expenses will only be allowed when the following three tests are met:

- The move must be made in connection with the commencement of work at a new job location and the moving expenses must be incurred within one year from the time the new/relocated employee first reports to the new job.
- During the 12-month period immediately following the move, the new/relocated employee must be employed full time at the new job for at least 39 weeks.
- The new job location must be at least 50 miles farther from the new/relocated employee's former principal residence than the former principal job location was from the former residence.

Approval to pay any relocation expenses must be obtained from the CIRM President prior to making a commitment to the individual to pay such expenses (a suggested format is attached). The new/relocated employee should file a claim using STD 262 (Travel Expense Claim). Receipts for all items except transportation costs of less than \$5.00 must be attached. Also, a copy of the prior approval by the President must be attached. A "fill and print" version of STD 262 is available on the CIRM web site.

The President may allow other relocation expenses to be reimbursed for new/relocated employees, such as: meals during the trip to the new location, connecting and/or disconnecting of utilities (excluding refundable deposits), transportation of domestic pets, house seeking at the new location, etc. However, the reimbursement of such expenses is considered taxable by the Internal Revenue Service and will be reported by CIRM on the employee's W-2 statement in the year for which it is received.

General

Actual expenses to attend an interview or to relocate which exceed the total estimate by 10% will not be paid unless approved by the President.

Whenever possible, both interviewees and relocating individuals should be required to use transportation and lodging acquired for them by CIRM staff using the state travel agency.

**Suggested Format for Prior Approval
To Claim Costs Related to an Interview**

To: Name of Interviewee

This authorizes you to be reimbursed for the following estimated costs needed to attend an interview for the position of _____ at _____ location _____:

Transportation costs:

-	Method of Transportation:		
	Airline	\$	_____
	Train	\$	_____
	Rental Car	\$	_____
	Private Car (@ \$.485/mile)	\$	_____
	Total Transportation		\$ _____

-	Lodging	\$	_____
-	Meals	\$	_____

Total Estimated Costs \$ _____

You will be reimbursed for the actual costs of the expenses listed above, provided that they do not exceed the total estimate by 10%. If transportation and lodging are arranged for you by CIRM staff, the full cost will be paid by CIRM.

Name of CIRM Employee Requesting Reimbursement Date

Approved,

Date
Zach Hall, President

**Suggested Format for Prior Approval
To Claim Costs Related to Relocation**

To: Name of Individual Relocating to Accept or Continue Employment with CIRM

This authorizes you to be reimbursed for the following estimated relocation costs that will be incurred to accept/continue employment with CIRM as name of position:

Transportation costs:

- Method of Transportation:
 - Airline \$ _____
 - Train \$ _____
 - Rental Car \$ _____
 - Private Car (@ \$.22/mile) \$ _____
 - Total Transportation \$ _____

- Lodging \$ _____
- Transportation of Personal/Professional Items \$ _____

Total Estimated Costs \$ _____

You will be reimbursed for the actual costs of the expenses listed above, provided that they do not exceed the total estimate by 10%. If transportation and lodging are arranged for you by CIRM, the full cost will be paid by CIRM.

Name of CIRM Employee Requesting Approval Date

Approved,

Zach Hall, President Date