

MANAGEMENT DIRECTIVE

625.3 Amended
Number

COMMONWEALTH OF PENNSYLVANIA GOVERNOR'S OFFICE

Subject:

Moving Employee Household Goods and Commonwealth Property

By Direction Of:



Robert A. Bittenbender, Secretary of the Budget

Date:

March 14, 1996

Procedures for requesting approval to move and to pay expenses incurred in moving employe household goods and Commonwealth property are contained herein. This amendment officially assigns duties and responsibilities to the Bureau of Commonwealth Payroll Operations (BCPO) and adds information to require employes who choose to move their household goods to submit a memo to BCPO stating they are aware that the Commonwealth is not liable for any injuries or damages to individuals or property.

1. SCOPE.

a. Applies to all departments, boards, and commissions with respect to moving employes household goods (§216 of *The Administrative Code of 1929*).

b. Applies to agencies under the Governor's jurisdiction with respect to moving Commonwealth property. Other executive agencies and legislative and judicial offices are encouraged to use these procedures.

2. **OBJECTIVE.** To provide for moving employes household goods and Commonwealth property.

3. POLICY.

a. *Section 216* of the *Administrative Code* authorizes payment for moving an employe's household goods upon approval of the Governor and under the following conditions:

(1) The employe has been employed by the same agency for more than one year.

(2) The employe is required by the head of the agency, by which employed, to change residence from one place in Pennsylvania to another.

b. For the purpose of this directive, an employe is considered to have been required to move in the following instances:

(1) When the employe would be terminated if he or she did not relocate as directed by the employing agency.

(2) When the employe is requested to relocate by the employing agency because the agency considers the relocation to be in the best interests of the agency. If the employe refuses to move, his or her employment will not be jeopardized.

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(3) When an employe applies for a position that, at the time of application, did not require relocation but when the employe is offered the position, it has been transferred to another locality and the employe, as a condition of accepting the position, must relocate.

(4) When an employe is a State Police officer and accepts a position or promotion that requires relocation.

(5) Any other situation where an employe did not make a voluntary decision to relocate but must relocate due to a management decision.

c. A Commonwealth employe (other than a State Police Officer) who applies for a position, which at the time of application would require relocation, is not eligible for reimbursement of moving expenses.

NOTE: Requests for moving expense reimbursement which do not readily fit one of the above policy statements should be referred to the Office of the Budget, Bureau of Financial Management, for a determination of whether the agency should reimburse the employe for moving expenses.

- d. Bureau of Commonwealth Payroll Operations (BCPO) is authorized to approve employes moving expenses on Form STD-202, Request for Transfer Travel Status/Moving Expenses.

e. Employes household goods should be moved by a commercial carrier. However, employes for personal reasons, with agency head and BCPO approval, may be authorized to move their household goods subject to the following:

(1) The total cost of the move is not greater than the cost of a commercial carrier.

(2) The Commonwealth is not held liable for any injury or damages to persons or property as a result of an employe moving his or her household goods.

(3) Employes are to move their household goods on their own time (nonworkdays, annual, or personal leave).

f. Moving Commonwealth property between locations outside the vicinity of Harrisburg are to be made by commercial carriers or Correctional Industries.

g. Moving Commonwealth property between locations within the vicinity of Harrisburg may be made by commercial carriers, Correctional Industries, or Commonwealth personnel.

h. Moving an employe's household goods or Commonwealth property must require at least two written bids from commercial carriers unless the employe chooses to move his or her household goods with a rental vehicle.

i. Correctional Industries may not be favored over other bidders. Terms and conditions applicable to other invited bidders must apply.

j. All bidders are required to complete Form STD-272, Firm Quoted Price Agreement, for moving employes household goods or Commonwealth property. The firm quoted price generally will be based on the estimated cost of the actual move plus other charges for insurance, cartons, and packing. Storage charges are not permitted.

k. Payment to the successful bidder shall be the lessor of the following:

(1) The amount shown on Form STD-272; or

(2) An amount equal to the total weight of items actually moved or actual hours required to complete the move, multiplied by the applicable rates plus other quoted charges. Additional charges arising out of obstructions at moving sites, e.g., inoperative elevators, parking restrictions, and ongoing construction, which were beyond control of the carrier, require agency substantiation and approval.

l. Invoices submitted by carriers are to be accompanied by a delivery receipt and, where applicable, a weight certificate.

4. DEFINITIONS.

a. Commercial carrier. A carrier holding appropriate Public Utility Commission (PUC) certificates.

b. Commonwealth property. Property other than real property consisting of temporary or movable items which is owned or possessed for use by the Commonwealth.

c. Firm quoted price. The agreed upon maximum amount that may be invoiced to the Commonwealth for moving an employee's household goods or for moving Commonwealth property. The firm quoted price generally will be calculated on the basis of the following:

(1) Estimated weight of items to be moved, multiplied by a stated rate per hundred-weight on moves over 40 miles.

(2) Estimated hours multiplied by hourly rates applicable to vehicles, drivers, helpers, and supervisors required on moves of 40 miles or less.

d. Household goods. An employee's furniture, appliances, home furnishings, fixtures and utensils, clothing and apparel, and other personal property of an employee for use in a dwelling.

- **e. Transfer travel status.** A period of time
- when employees are eligible for reimbursement of
- expenses at a new headquarters location in accordance with labor agreements and *Management Directive 230.10, Travel and Subsistence Allowances, Section 12.b.*

5. RESPONSIBILITIES.

a. Agencies shall:

- (1) Complete and submit approved Form STD-202 to BCPO on all moves of an employee's household goods or whenever an employee is placed in a transfer travel status.

(2) Inform commercial carriers and Correctional Industries of the Commonwealth's firm quoted price policy and ensure that bidders complete and sign Form STD-272.

(3) Obtain at least two written bids on all moves of an employee's household goods or Commonwealth property unless an employee chooses to move his or her household goods.

(4) Initiate Form STD-277, Request for Approval of Moving Expenses.

(5) Obtain PUC written verification of commercial carrier certifications.

(6) Submit approved Form STD-277 and corresponding Form STD-272 to agency comptroller.

b. BCPO shall:

(1) Approve or disapprove Form STD-202.

(2) Distribute copies of Form STD-202 to the employee, agency, and agency comptroller.

c. Agency comptrollers shall:

(1) Receive Form STD-277 and certify whether or not funds are available for the move.

(2) Ensure copies of Form STD-272 are attached to Form STD-277.

(3) Ensure Form STD-202 is approved by BCPO.

(4) Ensure payments to carriers are made in accordance with paragraph 3.k.

6. PROCEDURES.

Procedure A. Procedures for moving an employee's household goods.

Action By	Step	Action
Agency.	1.	Completes Form STD-202 and submits to BCPO.
BCPO.	2.	Approves or disapproves Form STD-202 and distributes copies.

Action By	Step	Action
Agency.	3.	Arranges for commercial carriers to survey household goods to be moved and obtains completed Form STD-272.
	4.	Selects commercial carriers based on the lowest firm quoted price stated on Form STD-272 and prepares Form STD-277. Selection of a carrier other than the lowest firm quoted price bidder must be justified as to being in the best interests of the Commonwealth. When moving employe household goods, state employe's name, social security number, title, and employment date.
	5.	Forwards Form STD-277, along with copies of Form STD-272, to the Chief of the PUC Tariff Division for verification that the selected carrier's tariff rate does not exceed the tariff rate on file and that the carrier is in compliance with established authority, tariff, mileage charts, and regulations.
PUC Tariff Division.	6.	Approves and returns Form STD-277 and copies of Form STD-272 to agency.
Agency.	7.	Forwards Form STD-277 (after PUC verification), along with copies of Form STD-272, to Agency Comptroller.
• Agency • Comptroller. •	8.	Receives Form STD-277 and certifies whether or not funds are available for the move.

Action By	Step	Action
Agency.	9.	Awards moves. NOTE: If an employe chooses to use a rental vehicle to move household goods, the rental vehicle fee, equipment rental fees, and gasoline costs should be claimed on Form STD-191, Travel Expense Voucher. Receipts are required for each item of expense claimed. Since all such moves will occur while the employe is on personal time, no travel expenses will be reimbursed. The Commonwealth will not be liable for any damage to persons or property caused by such a move. Employes choosing this option must submit to BCPO, through the agency, a memo stating that the employe is aware that the Commonwealth is not liable for any injury or damages to persons or property as a result of moving his or her household goods, and showing that the total cost of the move is not greater than the cost of a commercial carrier. At least one commercial carrier written estimate or bid must be attached, along with an estimate of the cost of a rental vehicle.

Procedure B. Procedures for moving Commonwealth property.

Action By	Step	Action
Agency.	1.	Arranges for commercial carriers, one of which may be Correctional Industries, to simultaneously attend an on-site inspection of property to be moved and obtains completed copies of Form STD-272.

Action By	Step	Action
Agency.	2.	Selects carrier on the basis of the lowest firm quoted price stated on Form STD-272.
	3.	Initiates Form STD-277. Selection of a carrier other than the lowest firm quoted price bidder must be justified as being in the best interest of the Commonwealth.
	4.	Forwards Form STD-277, along with copies of Form STD-272, to the Chief of the PUC Tariff Division for verification that the selected carrier's tariff rate does not exceed the tariff rate on file and that the carrier is in compliance with established authority, tariffs, mileage charts, and regulations.
PUC Tariff Division.	5.	Approves and returns Form STD-277 and copies of Form STD-272 to agency.
Agency.	6.	Forwards Form STD-277 along with copies of Form STD-272, to agency comptroller.
Agency Comptroller.	7.	Approves or disapproves and returns the STD-277 to the agency. Moves of Commonwealth property do not require approval of the Governor.
Agency.	8.	Awards moves.
	9.	Notifies the Bureau of Real Estate, Space Management Division, Department of General Services, Room 500,

Action By	Step	Action
Agency.		North Office Building, Harrisburg, PA 17125, of any moves involving a change of occupancy in space owned or leased by the Commonwealth. (See <i>Management Directive 625.2, Inventory of Commonwealth Real Property.</i>)
	10.	Notifies the Bureau of Buildings and Grounds, Department of General Services, Room 403, North Office Building, Harrisburg, PA 17125, of any moves within the Capitol Complex and in the Altoona, Philadelphia, Pittsburgh, Reading, and Scranton State Office Buildings.
		NOTE: Requests to bid may be directed to the: Department of Corrections Correctional Industries Order Section P.O. Box 47 Camp Hill, PA 17001-0047 Telephone: (717) 731-7135

Procedure C. Instructions for moving Commonwealth property.

Action By	Step	Action
Agency.	1.	Obtains approval from owners to move property used but not owned by the Commonwealth. If necessary, sends a representative to the new location to direct placement of property.

Action By	Step	Action
Agency.	2.	Secures and marks property as follows: <ol style="list-style-type: none"> a. Removes all supplies and equipment from desks, cabinets, and other storage containers. Records may be moved in filing cabinets with the compressors drawn tight and, if possible, the cabinets locked or otherwise secured. b. Packs supplies and small equipment in suitable containers. Secures each container with tape or cord. The weight of any container and its contents that cannot be handled by mechanical devices must not exceed 50 pounds. c. Marks each item of property and each container with its destination. d. Identifies any compound, mixture, element, material, equipment, or component which is dangerous to store or handle by printing HAZARDOUS MATERIAL on the container or on a tag affixed to the equipment. When appropriate, special handling instructions must also be attached to the container or equipment.

Action By	Step	Action
Agency.	3.	If necessary, secures the services of the manufacturer to move certain sensitive equipment such as computers, copiers, microfilming equipment, and specialized filing equipment. Written justification must be provided.

NOTE: Form STD-272 must be completed by each bidder listed on Form STD-277. Forms STD-272 may be obtained by calling 787-1015. Forms STD-277 may be obtained from the DGS Warehouse, Commodity Code No. 320-0100-091.

This directive supersedes Management Directive 625.3 dated August 31, 1994.