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# Guidelines and procedures for expatriates

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## Table of Contents

Introduction.....	3
Philosophy.....	3
Objectives.....	3
Scope .....	3
Definitions.....	3
Compensation and Benefits .....	4
Installation and repatriation .....	4
Home leave .....	5
Children’s education.....	6

## Introduction

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This document constitutes a supplement to IUCN's Global Human Resources Policy and local Conditions of Service. Its purpose is to provide guidelines and procedures that apply exclusively to staff members of the Secretariat with the status of "expatriate".

**The effective date is 01 January 2006.** Staff members appointed to expatriate status after this date are automatically subject to these guidelines. Staff members who have been assigned expatriate status prior to this date have the option of keeping the previously agreed conditions as per their current contract, or to accept the conditions of the present guidelines.

## Philosophy

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As a decentralised knowledge and learning organisation IUCN values the advantages of and recognises the need for developing and maintaining global and cross-cultural awareness. This is best achieved through targeted cross-national recruitment of new staff members or the transfer of existing staff members between regions and countries.

## Objectives

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The objectives of these guidelines and procedures are:

- To ensure an integrated approach towards expatriates across the Secretariat worldwide.
- To set the conditions for a fair and equitable treatment of expatriates worldwide (irrespective of country of origin or country of assignment).
- To establish a method of compensation for costs incurred by staff members as a direct consequence of their expatriate status.
- To recruit and retain the best qualified people around the globe.
- To enable the development of a unified organisational culture throughout the Secretariat.

## Scope

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As staff members of the Secretariat, expatriates are unconditionally subject to the Global Human Resources Policy and the Conditions of Service of the country of assignment.

## Definitions

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### Country of origin

This is either the country of which the expatriate is a national or the country in which the expatriate has resided for at least 10 years immediately prior to the transfer. In cases of dual nationality, each case will have to be considered on its merits in line with the spirit and intent of these Guidelines. The decision is made jointly between the parties concerned and the country (including place or town) of origin must be clearly specified in the letter of appointment.

### Country of assignment

This is the country to which the expatriate is assigned.

### Expatriate

This is a staff member who is transferred, on specific request of the Secretariat, to a country of assignment which is distinct from the country of origin, or an individual who has been recruited by the Secretariat to serve in a country of assignment which is distinct from his/her country of origin. To be eligible for expatriate status the appointment must be for a period of at least one year.

### Immediate family

For the sole purpose of these guidelines, *immediate family* means a spouse and dependent children (*Spouse* refers to either husband, wife, or legally recognised partner. *Dependent children* refers to natural and legally adopted children who are not married, have no significant source of income of their own and are under the age of 25).

## **Compensation and Benefits**

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The salary and benefits are negotiated and agreed individually between the staff member concerned and the Director General for headquarters and out-posted offices, or the Regional Director of the region in which the country of assignment is located, taking into consideration the actual salary and benefits of the staff member, the level (function group or grade) of the future position, as well as the compensation and benefits structure of the country of assignment.

Taking into consideration the measures established in the present guidelines, the Director General or Regional Directors respectively, according to national labour law and local conditions of service of the country of assignment, will determine the compensation and benefits structure.

The agreed conditions are stated in the letter of appointment.

## **Installation and repatriation**

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### **Principle**

IUCN grants installation and repatriation allowances to compensate expatriates for the costs incurred in transferring from one country to another in order to take up an appointment, to return at the end of service, or for relocation to another country of assignment upon termination of the initial assignment.

The Director General or Regional Director respectively will authorise, subject to national labour law and local conditions of service: (a) reimbursement of the lowest available airfare (including departure taxes and fees) and/or appropriate associated surface travel for the expatriate and his/her immediate family to travel to the country of assignment; (b) the cost of removal of household goods and personal effects including insurance; and (c) a non-accountable installation allowance for the expatriate and members of his/her immediate family who accompany him/her, to help defray costs of installation in the country of assignment.

The same principles as above apply upon repatriation to the country of origin, except when the departing staff member is eligible for relocation costs to be absorbed by the next contracting organisation and provided that repatriation takes place within six months of the termination date.

### **Procedure**

1. The expatriate shall submit to HRMG of the region concerned (HQ for out-posted offices) two competitive estimates for removal of household goods. HRMG will indicate which should be accepted.
2. For travel, the expatriate shall obtain the lowest available airfare and/or associated surface travel for him/her and his/her immediate family.
3. IUCN will pay, upon arrival, a non-accountable installation allowance to help defray costs of installation. This installation allowance shall amount up to 30 times 75% of the IUCN-published per

diem for the country of assignment. In addition, half of that amount shall be paid for each immediate family member that accompanies the expatriate.

4. For repatriation, the expatriate shall follow the same procedure as explained in paragraphs (1) and (2) above.

### **General conditions**

#### *Maximum allowed quantity of household goods*

The quantity of household goods and personal effects for which freight is paid by IUCN shall not exceed 17m<sup>3</sup> for the expatriate plus 5 m<sup>3</sup> for each immediate family member. The total shall not normally exceed the volume of one standard container. The expatriate may choose to use air or surface freight as appropriate, or a mix of both, subject to the approval process outlined above. No separate allowance will be made for the transport of motor vehicles.

#### *Repayment on early termination*

An expatriate may be asked to repay all or parts of the provided allowances (travel, removal of household goods, non-accountable installation allowance), if he/she terminates his/her appointment before one year of receiving them.

Equally, repatriation costs will not be reimbursed if an expatriate terminates his/her contract during the first year of assignment.

## **Home leave**

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### **Principle**

It is desirable that an expatriate and his/her immediate family maintain regular contact with the culture, relatives and friends of their country of origin. An expatriate and his/her immediate family shall therefore be entitled to regular visits to the country of origin and eligible for a refund of the travel costs from the country of assignment to the country of origin.

Home leave may be taken for the first time after two years of service in the country of assignment and every second year thereafter.

### **Procedure**

1. The timing of the home leave requires the approval of the respective line manager and the endorsement of HRMG. A regular travel authorisation form or similar document should be used for this purpose.
2. Evidence of the expatriate having sought the lowest possible air fare shall be required; excursion or other concessionary fares would be the norm. The regular expense claims process should be used to obtain reimbursement of the travelling costs.
3. Subject to the approval of the line manager concerned, an expatriate may postpone a home leave for up to 12 months. A postponement will not alter the established home leave cycle.

## Children's education

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### **Principle**

Children's education can be one of the major stumbling blocks to a successful expatriate programme. Very often there are substantial costs involved and it is therefore of utmost importance that IUCN addresses this issue in a fair and equitable manner.

The aim of these guidelines is that the expatriate should not incur substantial, additional expenses for the education of his/her dependent children due to the unavailability of appropriate public education facilities in the country of assignment.

IUCN will contribute to the education costs of dependent children of expatriates if the education system in the country of assignment is fundamentally different from the one in the country of origin and/or the language used at local public schools is distinct from the mother tongue of the children concerned and as a direct consequence thereof a private school is the only option.

An expatriate must be able to prove a clear, long-term disadvantage to the children by putting them into a local school versus a private educational institution in the country of assignment or a boarding school/university in a country other than the country of assignment.

### **Procedure**

It is the expatriate's responsibility to select the most appropriate schooling option. Only one of the following two options can be chosen by the expatriate and it will apply to all his/her children. Once the choice is made, it cannot be changed. A combination of the two options is not possible.

#### *Option 1:*

Eligibility for an education allowance starts with the first compulsory school year and ends with the achievement of a university degree or the obtainment of a diploma/certificate from a professional school. In no case will it go beyond the year in which the children reach the age of 25. Postgraduate studies or studies for a second degree are not refundable.

The Regional Director (DG for HQ and out-posted offices) will designate a private school and/or university which, in his/her opinion, provide education at a generally accepted standard. The amount equivalent to 75% of the eligible fees (see General Conditions below) of the designated school/university forms the upper limit of the reimbursement to the expatriate. For the purpose of achieving a consistent and coherent interpretation of this rule across the organisation, both the designated school/university and the upper limit require the endorsement of the Director HRMG at HQ.

#### *Option 2:*

Eligibility for an education allowance starts with the first compulsory school year and ends with the completion of secondary education.

The Regional Director (DG for HQ and out-posted offices) will designate a private school which, in his/her opinion, provides primary and secondary education at a generally accepted standard. The amount equivalent to 90% of the eligible fees (see General Conditions below) of the designated school forms the upper limit of the reimbursement to the expatriate. For the purpose of achieving a consistent and coherent interpretation of this rule across the organisation, both the designated school and the upper limit require the endorsement of the Director HRMG at HQ.

## **General conditions**

### *Costs eligible for reimbursement*

- Fees for tuition, registration and examinations
- Compulsory text books, teaching/learning materials and curriculum related activities
- Transportation to and from the school if provided by the school (school bus)
- Boarding expenses in the case the dependent child attends school/university in a country other than the country of assignment
- In the case the dependent child attends school/university in a country other than the country of assignment, a visit to the country of assignment during each school year.
- Extra-curricular, non-compulsory lessons or activities are not refundable.