

EB/CAP/76/13

September 7, 1976

To: Members of the Committee on Administrative Policies
From: The Committee Secretary
Subject: Report and Recommendations on Staff Study Programs

Attached is a report prepared for the information of the Committee on Administrative Policies on the operation of the Individual Study Programs, covering the year ended April 30, 1976. The report includes recommendations on modifications to the Sabbatical Leave Program (Individual Study Program I) and establishment of a new study program involving leave at half pay (Individual Study Program IV).

Att: (1)

Other Distribution:
Members of the Executive Board

INTERNATIONAL MONETARY FUND

Report and Recommendations on Staff Study Programs

Prepared by Administration Department

I. Introduction

This report reviews developments under the study and sabbatical leave programs for staff during fiscal year 1976 and proposes two modifications which experience has suggested. The principal proposal is to set up a further program for study leave at half pay. The report on the past year deals first with Individual Study Program II (Leave Without Pay for Full-Time Graduate Study) and Individual Study Program III (Part-Time Study), followed by Other External Training and Individual Study Program I (Sabbatical Leave).

II. Program II - Leave Without Pay for Full-Time Graduate Study

Five requests for study leave were approved since the last report. Three staff members are working on degrees or doing research at the London School of Economics. A fourth staff member took additional leave to finish work on a Ph.D. degree in economics at Yale University. A fifth staff member worked on a dissertation on excise systems for a Ph.D. degree in economics at Leiden University, but has now returned to duty.

Of the five staff members noted in last year's report who had their requests for study leave approved, one has had his leave extended through September, three have returned to duty and one has resigned from the Fund.

To date, all applications presented for full-time study leave have been approved. The total number of staff members involved has remained small, but interest seems to be increasing. Judging from experience so far, the program has on the whole proved to be beneficial to both the Fund and the staff members concerned. No changes appear necessary.

III. Program III - Part-Time Study

Program III (Staff Bulletins 69/6 (2-17-69), 69/12 (6-18-69) and 74/5 (3-13-74)) permits staff members, including Fixed-Term Appointees and Assistants to Executive Directors, to receive reimbursement of three fourths of the tuition costs for part-time study. The conditions include a year's

service and good performance on the part of the staff member, courses or programs which are deemed to be in fields of interest to the Fund, attendance outside of normal working hours and satisfactory completion before payment is made.

The reimbursement for 191 courses under Program III represented a slight increase over the number reimbursed in fiscal year 1975 (refer to Table 1). 84 staff members benefitted from this assistance as compared with 76 a year ago. However, the cost of the program (Table 2) declined by about 10 per cent. The decrease seems to reflect a higher percentage of studies being taken at institutions where tuition is lower (e.g., state universities, junior colleges, commercial schools, etc.).

As noted in previous reports, it is not possible to measure with any precision the usefulness of this program to the Fund, but it is possible to identify a number of staff members, particularly in the lower ranges, whose effectiveness and career prospects were improved as a result of the studies they undertook. As an example, a majority of the A-E staff members who were promoted to Range F in May had received assistance under this program. It appears that the program contributed to the better morale of many staff members by assisting them to broaden their educational background and enhance their technical qualifications.

IV. Other External Training

As mentioned in previous reports, Other External Training covers all cases where the Fund takes the initiative in arranging for staff members to undertake specific training outside the Fund for short periods because such training would help meet a particular organizational need. 36 staff members participated in such training during fiscal year 1976, an increase as compared with the year before. As Table 2 shows, there was a marked increase in the cost of such training in the year ended April 30, 1976. This was due mainly to certain initiatives taken in the management development area and also to sending two staff members to participate in the International Banking Summer School held in France and Australia, respectively. Included in the cost are per diem and transportation where required. Excluding the cost for special language training outside regular Fund courses, the cost of Other External Training increased from \$11,498 to \$22,637^{1/} over the twelve months ended April 30, 1976.^{2/} In addition to the 2 staff members mentioned above, 22 staff members received special training in data processing, 4 in management, 2 each in econometrics and library science, 2 staff members attended a national tax association symposium, 1 took an auditing course and 1 attended an equipment maintenance program. The program is tailored to meet Fund needs through development of staff skills and the results seem to be worthwhile.

^{1/} Not included in this figure is \$630 for courses taken during FY 1976 but charged to FY 1977.

^{2/} External language training has also increased - from \$14,188 to \$23,993 (this figure includes \$6,492 for language training to staff in Offices of Executive Directors).

V. Program I - Sabbatical Leave

No requests were approved for sabbatical leave during FY 1976. One staff member, referred to in EB/CAP/75/10 (6-19-75), returned to duty after a successful year on such leave. The lagging interest in sabbatical leave led to a review of the policy during the year to determine whether the program is appropriate for meeting current training and development needs of senior staff.

The sabbatical leave program established in 1969 was designed to accommodate a small group of senior staff members whose work had earned them special recognition and who would benefit from an opportunity to refurbish or broaden their professional skills away from the normal pressures of work. The intention from the start was to keep the program very limited and to look on participation in part as a reward for long and distinguished service. Participation, however, has not even reached the level expected and the results have generally not been all that were hoped for.

VI. Proposal for Modification of Sabbatical Leave Program

Since its inception only ten staff members have participated in the sabbatical leave program and the experience of that period indicates that the scope should be shifted to apply primarily to cases where its use would assist in the further development of outstanding officers at the division chief and higher levels who are judged to have potential to assume more responsible positions or work. For such individuals the leave would be looked upon essentially as an instrument of career development rather than a reward. In such cases, each sabbatical leave program would be tailor-made to fit an individual's needs and would emphasize the types of training and experience which would best augment and develop the professional skills needed, both immediately and later. Staff members below the level of division chief would not be eligible for the program.

It is difficult to judge the interest such a broadening of the program might generate. In order to maintain a careful control, however, the intention would be to limit sabbatical leaves to three in any year, as at present.

VII. Proposal for a Program IV - Leave at Half Pay

The review also made it evident that existing study programs have not been well designed for meeting the career development needs of a group of professionals in the middle salary ranges in whom the Fund should have a special interest because they have shown potential to assume leadership positions in the future. Indications are that there would be substantial interest in a program for this group that would fall midway between sabbatical leave (ISP I) and leave without pay for graduate study (ISP II).

It is proposed, therefore, to establish a new program designed specifically to fill this gap, open to staff at Range H and above. The conditions for such a program would be as follows:

1. Candidates for the program would have to have had a minimum of five years of service with the Fund and to have demonstrated superior potential to assume positions of leadership in the future. They would indicate their intention to serve at least three additional years on completing their leave and they should be the kind of staff members whom the Fund would be pleased to have make their career in the organization.

2. Candidates would show that the leave would be used to meet particular development needs, such as:

(i) updating or augmenting technical skills needed in Fund work, or

(ii) developing new skills which will be needed vis-a-vis new assignments or in preparation for higher level responsibilities.

Applications for participation in this program would be subject to the scrutiny of an interdepartmental panel of senior staff. Initially, participation would be limited to five staff members per year.

Upon approval by the Management, participants would be entitled to leave at half pay, full allowances and normal staff benefits. Three fourths of the tuition costs for required training would be reimbursed. In addition, on request participants could be granted an interest-free salary advance of up to six months of full salary which would be repayable at a rate of one month a year on return to duty. The maximum period of leave would be one year, with the exact period being determined on an individual basis bearing in mind the training objectives concerned. The same travel benefits as in Program I would be provided to those receiving their training outside of Washington, D.C.

Table 1. Subjects Studied Under Program III^{1/}
 (Year Ended April 30)

Subjects Studied	Number of Courses	
	1975	1976
Accounting	10	10
Business Administration and Management ^{2/}	20	17
Data Processing ^{2/}	8	12
Econometrics	6	8
Economics ^{2/}	78	62
Editing	1	2
English	14	14
Graphic Arts and Printing	3	-
Languages Other than English	3	5
Library Science	2	7
Linguistics and Translation	4	6
Mathematics ^{2/}	14	17
Shorthand and Stenotype	2	6
Statistics ^{2/}	5	7
Other	<u>18</u>	<u>18</u>
Total Number of Courses	188	191

^{1/} Each course or program of study is listed under the year in which reimbursement was made. Some staff members received reimbursement for more than one course in a year. In 1975, 76 staff participated as compared with 84 during 1976.

^{2/} These general subject headings cover a variety of courses.

Table 2. Cost of Individual Study Programs for Fiscal Year Ended April 30^{1/}
(In U.S. dollars)

	1975			Other	Total	1976				
	I	II	III			I	II	III	Other	Total
Tuition/fees	--	2,367	34,235	19,469 ^{2/}	56,071	--	1,013	30,686	36,176 ^{2/}	67,875
Travel, shipment of effects, per diem, etc.	766	4,102	--	6,217	11,085	2,978	13,001	--	10,454	26,433
Miscellaneous	444	--	--	--	444	--	--	--	--	--
Total	1,210	6,469	34,235	25,686 ^{2/}	67,600	2,978	14,014	30,686	46,630 ^{2/}	94,308

^{1/} Costs are shown under the year in which payment was made.

^{2/} Includes \$14,188 and \$23,993 respectively for 1975 and 1976 for private language instruction.