

**IMMEDIATE
ATTENTION**

EBAP/10/2
Revision 1

March 3, 2010

To: Members of the Executive Board

From: The Secretary

Subject: **Proposed Changes and Modifications to the Fund's Shipping Policies**

Attached for consideration by the Executive Directors is a revised version of the paper on proposed changes and modifications to the Fund's shipping policies (EBAP/10/2, 1/11/10). This revision incorporates changes to the excess baggage allowance that reflects the difference in cost between domestic and international excess baggage rates.

It is not proposed to bring this matter to the agenda of the Executive Board for discussion unless an Executive Director so requests by **noon on Wednesday, March 10, 2010**. In the absence of such a request, the proposed decision that appears on page 10 will be deemed approved by the Executive Board and it will be so recorded in the minutes of the next meeting thereafter.

Questions may be referred to Mr. Zimmerman, TGS (ext. 34702) and Ms. Shannon, HRD (ext. 37258).

Att: (1)

Other Distribution:
Department Heads

INTERNATIONAL MONETARY FUND

Proposed Changes and Modifications to the Fund's Shipping Policies

Prepared by the Human Resources Department and the
Technology and General Services Department

In consultation with the Finance Department and the Legal Department

Approved by Frank Harnischfeger and Shirley Siegel

March 2, 2010

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EXECUTIVE SUMMARY

This paper is the first in a series of proposals bringing simplification and automation to human resources policies and benefits.

The proposals in this paper address the Fund's benefits shipping policies and are in line with the OIA's recommendations to streamline and simplify. The proposed changes will reduce burden on staff, speed processing, and better align the Fund's benefit with the practices of other international organizations. It is expected that the budgetary impact of these proposed changes will be broadly cost neutral to the Fund while not reducing the aggregate monetary value of the benefits offered to the staff and while enhancing staff choice in most cases.

The proposals are as follows:

Provide three general categories for shipping.¹ Presently there are 16 different permutations of shipping entitlements depending on employment categories and type of assignment. Reducing these to 3 will reduce administrative complexity and speed processing.

Provide lump-sum cash allowance options. At present, all shipment and/or storage of household and personal effects have to be done through the Fund's shipping contractor. Under the new policy, a lump-sum cash option will be offered. The lump-sum cash option will provide flexibility in choosing how to arrange for the shipment and/or storage of household and personal effects. This change responds to the generally expressed desire for a choice of supplier and also creates incentives for the Fund's competitively selected supplier to maintain high service quality. Using the Fund's contractor will continue to remain an option for individuals who prefer it. A lump-sum cash allowance will also be provided *in place of* shipping personal effects via air cargo. In addition, Resident Representatives will continue to be provided with a lump-sum cash allowance *in lieu of* shipping or storing a motor vehicle, boat, recreational vehicle, or other type of vehicle. However, it is proposed that the Fund no longer ship or store motor vehicles, boats, recreation or other type of vehicles, because this option has proved to be impractical and unnecessary.

Eliminate the weight criterion for household goods and standardize the use of containers for the shipment and storage of household goods. Having a weight constraint in addition to the size of an ocean shipping container (i.e., whether 20 ft. or 40 ft.), makes the policy complex to administer and has been a source of confusion and contention. Furthermore, the ocean shipping industry applies a fixed price based primarily on the commodity and the container size rather than on weight. It is likewise proposed that the

¹ OEDs are not included in these three categories.

storage entitlement for eligible staff be standardized based on the status of the staff member (i.e., a 20 ft. container for a single staff member and a 40 ft. container for a staff member with a family).

Standardize the time limit for storage-in-transit (SIT)² and for storage and transit insurance. Applying a uniform time limit for SIT to 90 days and standardizing coverage for storage and transit insurance will simplify the application and administration of these policies.

Increase and standardize the shipping entitlement for Resident Representatives and eliminate the cost-share formula. The current cost share formula—applied to shipments that exceed the shipping entitlement—adds needless complexity and requires excessive administrative resources to track and implement. Increasing and standardizing the entitlement will provide greater flexibility and simplicity thereby eliminating the need for the cost share formula.

² Storage-in-transit (SIT) is offered to staff to allow sufficient time to find a residence or to reach their final travel destination prior to delivery to residence.

I. INTRODUCTION

1. The proposals contained in this paper were formulated by TGS in collaboration with HRD. It is the first in a series of proposals bringing simplification and automation to human resources policies and benefits.
2. This paper proposes that the Executive Board approve changes to the benefit shipping policies that are designed to simplify and streamline them, make them more flexible, bring them in line with best practices, and to align them with other International Financial Institutions (IFIs) and comparator organizations. The simplifying and streamlining of the policies is also consistent with the recommendations proposed by the Office of Internal Audit and Inspection (OIA).³
3. The budgetary impact of the proposed changes is expected to be cost-neutral, although intangible benefits will include reduced administrative processing time and improved staff satisfaction with the service.
4. TGS undertook an analysis of benefit shipping trends over a four-year period. Meetings and consultations were held with comparator organizations including the World Bank/IFC and the Inter-American Development Bank. Usage and cost data showed that a more simplified and streamlined policy could be adopted. These conclusions were reviewed extensively with HRD and a consensus was reached to move forward with the proposals (see Attachment I).
5. These policy recommendations have also been reviewed and endorsed by departments instrumental in its implementation including the Finance Department (FIN), the Office of Budget and Planning (OBP), and have been reviewed by the Legal Department (LEG). The Staff Association Committee (SAC) has also been consulted.

II. EXISTING SHIPPING POLICIES AND RELATED ISSUES

6. **There are currently 16 permutations of the shipping benefits policy that fall under three general categories** (i) benefits for Headquarters-based staff, (ii) benefits for non-headquarters-based staff, and (iii) benefits for staff under the Individual Study Program. The interpretation and application of the various policies under these categories are too complex and require significant administrative resources. A simplified and streamlined policy will make for a more effective and efficient use of the Fund's resources. The current policy is shown in Attachment II.
7. **The current shipping policy limits choice.** At present, all benefit shipping is organized by the Fund's Transportation Section and authorized through the Fund's Washington-based contractor. It is not possible to opt to use another shipper.

³On March 30, 2007, the Fund's Office of Internal Audit and Inspection conducted a review of TGS Support Services. Among its recommendations is a proposal for TGS and HRD to simplify the Fund's shipping policies and to present it to management for implementation in FY2009.

8. **Under the current policy, a weight limit is applied to shipped household goods.** For instance, regular single staff joining or leaving the Fund are entitled to a 20-ft. ocean container not to exceed 8,000 lbs. and regular staff with a family are entitled to a 40-ft. ocean container not to exceed 15,000 lbs. for the shipment of household goods. This weight restriction is no longer necessary.⁴ Currently the ocean shipping industry applies a fixed (lump-sum) price based on commodity and container size rather than on weight. Therefore, basing the policy on container size (i.e., 20 ft. or 40 ft.) and eliminating the weight restrictions will align the Fund's practices with current industry norms, thereby reducing complexity.

9. **The Fund's policies are not aligned with best industry practice and with the policies of comparator organizations, including International Financial Institutions (IFIs).** Best practices in the area of employee relocation shows that most companies and other IFI's offer flexible options for the movement of personal effects, including lump-sum cash payments. Both the World Bank and the Inter-American Development Bank (IADB) have such policies (see Attachment III).⁵

III. PROPOSED CHANGES AND MODIFICATIONS TO THE SHIPPING POLICIES

10. A summary of the proposed simplified policy is shown in Attachment I.

A. A Simplified and Streamlined Shipping Policy

11. **The current entitlement structure needs to be simplified from the current 16 permutations to 3 (based on family size, duration of assignment and category of employment).** The reduction in the number of permutations for shipping entitlements will reduce complexity particularly for staff going or returning from Resident Representative Assignments, External Assignments, and Individual Study Programs.

B. A Lump-Sum Cash Option

12. **A lump-sum cash option is proposed for the shipment of household goods.** At present, all shipment and/or storage of household and personal effects for regular staff have to be done through the Fund's shipping contractor. The new policy will allow eligible staff the choice to either ship household goods via the Fund's shipping contractor, *or* to

⁴ Over the past several years, the international moving industry has changed whereby weight is less significant and lump sum or minimum costs have become more relevant for household goods shipped in 20-ft. and 40-ft. ocean containers.

⁵ Discussions with the United Nations indicated that their shipping policies are similar to those currently employed by the World Bank and IADB and are aligned with best practices.

receive a lump-sum cash option and make alternate arrangements. Those staff that elect the lump-sum option will not be eligible for a tax allowance payment on this benefit payment.⁶

13. **A lump-sum “excess baggage” allowance is proposed in place of shipping personal effects via air cargo.** Currently eligible staff are entitled to ship 500 lbs. of personal effects as unaccompanied air cargo. It is proposed that a lump-sum cash allowance of \$500 for domestic shipments and \$2,000 for international shipments —based on the average freight equivalent of 500 lbs. gross of personal effects via air cargo—will be given to all eligible staff regardless of family size or duration of assignment. This cash allowance will provide staff with better flexibility and choice. Moreover, it will avoid the restrictions and delays staff currently experience shipping via air cargo.⁷ Staff will be eligible for a tax allowance on the excess baggage grant.⁸

14. **A one-time flat lump-sum cash allowance for Resident Representatives is proposed in lieu of shipping and storing automobiles, motorcycles, boats, or other recreational vehicles.** Currently Resident Representatives are allowed to ship one privately owned automobile. Those who elect not to ship a vehicle are given a lump-sum cash allowance of \$8,400 (the average cost of shipping a car to and from a post). Resident Representatives are also eligible to store up to two automobiles in the Washington, D.C. contractor’s warehouse for the duration of their overseas assignment. However, experience shows that shipping and long-term storage of the vehicles is neither cost effective nor practical.⁹ It is therefore proposed that in lieu of shipment and storage of vehicles, all Resident Representatives be provided with a one-time \$8,400 lump-sum cash allowance that could be used for shipping and/or storing their privately owned vehicles at their own discretion. It is further proposed that the Fund discontinue the option to ship or store vehicles

⁶ Under Section 14(b) of the By-Laws, staff are entitled to a tax allowance “that the Executive Board determines to be reasonably related to the taxes paid by them” on their Fund salaries and allowances. When the Fund ships household goods for staff members, no U.S. income tax is payable on the value of that benefit, and there is no entitlement to tax allowance. The lump sum option would be taxable for staff who are U.S. nationals, but if their relocation is for work (as opposed to retirement, for example), then actual moving expenses may be tax-deductible. Because staff would be able to avoid income tax by having the Fund ship their household goods, or by adhering to the tax rules on deductible moving expenses, it is appropriate that no tax allowance should be paid in those cases where staff have the choice and prefer the lump sum option on an after-tax basis.

⁷ Since the 9/11 terrorist attacks, restrictions include screening by the Department of Homeland Security and the Transportation Security Administration; booking and loading restrictions to all cargo (no passenger) carriers; customs clearance and extra handling delays.

⁸ In contrast to the lump sum option for shipment of household goods, for which no tax allowance will be paid, staff will be eligible for tax allowance on the excess baggage grant and on the Resident Representative allowance, because no tax-efficient alternative benefit is offered to staff who are liable for tax on their Fund income.

⁹ The storing of vehicles for the duration of the Resident Representative assignment (normally two years or longer) frequently results in the vehicle becoming inoperable due to lack of use.

(for the reasons cited). A tax allowance will continue to be paid on this lump-sum cash allowance.

C. Elimination of Weight Criteria for Surface Shipment

15. **It is proposed that household goods shipments be based on a standard 20 ft. container for single staff and a 40 ft. container for a family, regardless of weight and for all assignments of one year or more.** Currently single staff is entitled to a 20-ft. ocean container not to exceed 8,000 lbs. and family a 40-ft. ocean container not to exceed 15,000 lbs. for the shipment of household goods (HHG). Meanwhile, staff appointed on Resident Representative Assignments, External Assignments and Individual Study Programs have various weight allowances dependent on family size and the duration of the assignment (see Attachment II). The elimination of the weight criteria will bring the Fund's policies in line with comparator organizations, with ocean industry shipping standards¹⁰ and with best practices. In addition, it will eliminate areas that currently give rise to disagreement between the staff member, the Fund, and the shipping contractor.¹¹

D. Standardize Storage-in-Transit and Transit and Storage Insurance Limits

16. **It is proposed that the limits for storage-in-transit (SIT) be standardized to 90 days and that the storage and transit insurance limits also be standardized.** The current SIT allowances are based on the type of appointment and vary from between 30 to 90 days. The same is applied to transit and storage insurance. Standardizing the storage-in-transit limits and transit and storage insurance—based on family size/size of container (single or family)—will reduce policy complexity and make it simpler to apply.

E. Increase the Household Goods Surface Allowance for Resident Representatives and Eliminate the Cost-Sharing Formula

17. **It is proposed that the surface allowance for Resident Representatives be increased from the current weight allowances** to a standardized 20-ft. container for single and 40-ft. container for family and that the cost-share formula be eliminated. The current weight based policy is obsolete, convoluted and complex requiring a Resident Representative to reimburse the Fund a portion of the shipping costs in excess of the shipping entitlement. This cost sharing is based on a scaled formula of 25, 50, and 100 percent in excess of the shipping costs.¹²

¹⁰ The ocean shipping industry applies a fixed price based primarily on the commodity and the container size rather than on weight.

¹¹ Staff often complains that the ocean shipping container is only partially full once it has reached the entitlement weight limit.

¹² If actual shipping expense exceeds the value of the entitlement allowance stated above, the Resident Representative will be required to reimburse the Fund 25 percent of the cost of any excess up to 25 percent of the entitlement and 50 percent of the cost of any excess up to an additional 25 percent of the entitlement

(continued...)

18. **It is proposed to modify the unlimited storage entitlement to a standardized container of 20 ft. for a single staff member and 40 ft. for a family.** Currently whatever is not shipped is stored at Fund expense (regardless of weight or value). An unlimited storage entitlement is neither cost-effective nor effective in incentivizing staff to better plan for their relocation.¹³ A standardized storage entitlement—based on family size—will be more efficient and cost effective.

19. **It is proposed that the Executive Board authorize the Managing Director** or his delegate to adjust the lump-sum amounts as appropriate.

IV. BUDGETARY IMPACT

20. A lump-sum cash allowance will provide staff with choice, with increased flexibility and with incentive to make better informed and sounder economic decisions. A lump sum will also reduce the Fund's administrative costs (depending on the percentage of staff who elect the lump-sum) while retaining the option for staff to arrange shipping via the shipping contractor.

Departments involved in administering or interpreting the program (TGS, HRD, FIN, and OBP) collaborated to develop a policy that is flexible and financially viable—for both the Fund and for eligible staff. The proposed policy changes are expected to be cost-neutral assuming that 50 percent elect the cash option and 50 percent ship via the contractor. Based on the experience of the comparator organizations, it is estimated that over time, the majority of Fund staff may ultimately choose the cash option. There will also be cost saving from outsourced services as well as an expected reduction in the amount of the incentive payment to the contractor. Looking forward, the lump-sum cash allowances will be monitored and adjusted to ensure that it meets the staff's needs.¹⁴

V. TRANSITIONAL ARRANGEMENTS AND OTHER INFORMATION

21. **Administrative and transitional arrangements will be required to ensure that staffs who are entitled to the current shipping provisions or who will be affected by the new policies will have the flexibility to choose either as part of their relocation decision.** These include staff who were assigned abroad under the current rules, staff who have

(between 25 percent and 50 percent of the entitlement). Excess shipping expenses greater than 50 percent of the entitlement will be reimbursed, by the Resident Representative, at 100 percent.

¹³ It also encourages staff to store items they do not need or want and, occasionally, the storage company is asked to donate it to charity.

¹⁴ Lump-sum payments made to staff will be compared to actual costs and adjusted as needed on annual basis (or as often as needed). The Fund's shipping policies will be reviewed again in two years to evaluate the impact of the policy reforms and determine whether any further refinement should be considered.

separated from the Fund but have not initiated their relocation entitlement, or staff who have volunteered under the Fund's Restructuring Initiative, who may have made relocation plans on the basis of the current policy. The administrative and transitional arrangements under the new shipping and storage policies would be applied as follows:

- Employees who have separated from the Fund and are still eligible for resettlement shipping benefits will be eligible for the previous or new level of shipping entitlements.
- Employees who have started a period of SBF leave will be eligible for the previous or new level of shipping entitlements.
- Employees who have volunteered under the Fund's restructuring initiative and have not separated or started a period of SBF leave will be eligible for the previous or new level of shipping entitlements.
- Resident Representatives, staff transferred to Fund Overseas offices, long-term technical assistance experts, staff on external assignments and staff on individual study programs will remain eligible for the previous shipping and storage entitlements until the end of their current assignment.

PROPOSED DECISION

It is proposed that the following decision be adopted by the Executive Board.

The Executive Board approves the changes to the shipping policies set out in paragraphs 11 through 19 and paragraph 21 of EBAP/10/2, Rev. 1 (3/3/10) and with effect from May 1, 2010.

Attachment I. Proposed Changes and Modification to the Shipping Policy

Type & Duration of Assignment	Shipping via Contractor						Lump-Sum Cash Option		
	Persons Relocating	Surface Household Goods in Container	Surface Household Goods Transit Insurance	Surface Household Goods Storage-in-Transit (SIT)	Household & Personal Effects Permanent Storage	Household & Personal Effects Storage Insurance	Persons Relocating	Surface Household Goods Lump-Sum Option	Personal Effects: Excess Baggage Cash Allowance
Staff & Contractual Appointments of 1 Year or More (Joining/Leaving)	Single	20-ft.	\$115K	90 Days	N/A	NA	Single	Domestic: \$6,000 International: \$8,000	\$500 domestic \$2,000 international (Single or Family)
	Family	40-ft.	\$165K				Family	Domestic: \$10,000 International: \$14,000	
Staff with Non-HQ Based Assignments of 1 Year or More (Transfers)	Single	20-ft.	\$115K		20-ft (if 20-ft shipped) 2x20-ft (if 0 Shipped)	\$115K	Single	Domestic: \$6,000 International: \$8,000	
	Family	40-ft.	\$165K		20-ft (if 40-ft shipped) 2x20-ft (if 20-ft shipped) 3x20-ft (if 0 shipped)		Family	Domestic: \$10,000 International: \$14,000	
Contractual (Less than 1 year), Individual Study Programs (Up to 6 Months) & Long-Term Tech. Assist. Experts (1 Year or More)	Single or Family	N/A	N/A	N/A	N/A	N/A	Single or Family	N/A	

Attachment II. Current Shipping Policy

	Personnel Type	Persons Relocating	Surface Entitlement	Air Entitlement	Office Shipment	No. of Autos Store/Ship	Storage in Transit	Permanent Storage	Transit Insurance	Storage Insurance
HQ-Based	Staff Member Regular and Fixed-Term	Employee/Spouse/Domestic Partner Only	One 20-ft. Container containing a maximum of 8,000 lbs./3636 kgs. Net	500 lbs./227 kgs. Gross	N/A	Ship: 1	90 Days	None	\$120,000	N/A
		With Family/Domestic Partner	One 40-ft. Container containing a maximum of 15,000 lbs./3636 kgs. Net	500 lbs./227 kgs. Gross	N/A	Ship: 1	90 Days	None	\$180,000	N/A
	Executive Director, Alternates, and Senior Advisors	Executive Director/Alternate/Senior Advisor Only	One 20-ft. Container containing a maximum of 8,000 lbs./3636 kgs. Net	200 lbs./91 kgs. Gross	N/A	Ship: 1	90 Days	None	Full Replacement / Declared Value	N/A
		With Family/Domestic Partner	One 40-ft. Container containing a maximum of 15,000 lbs./3636 kgs. Net	200 lbs./91 kgs. Gross + 100 lbs./45 kgs. Gross per Dependent	N/A	Ship: 1	90 Days	None	Full Replacement / Declared Value	N/A
	Contractual, Headquarter-based Technical Assistance Advisors	Employee Only	One 20-ft. Container containing a maximum of 8,000 lbs./3636 kgs. Net	500 lbs./227 kgs. Gross	N/A	Ship: 1	90 Days	None	\$120,000	N/A
		With Family	One 40-ft. Container containing a maximum of 15,000 lbs./3636 kgs. Net	500 lbs./227 kgs. Gross	N/A	Ship: 1	90 Days	None	\$180,000	N/A
	Contractual Employee Less Than 3 Months	Employee Only	None	100 lbs/45 kgs gross (If approved by Chief, HR Services Division)	N/A	Ship: 0	None	None	Replacement	N/A
		With Family	Not Applicable							

	Personnel Type	Persons Relocating	Surface Entitlement	Air Entitlement	Office Shipment	No. of Autos Store/Ship	Storage in Transit	Permanent Storage	Transit Insurance	Storage Insurance
	Contractual Employee Appt. 3 Months to Less Than 6 Months	Employee Only	None	200 lbs./91 kgs. Gross	N/A	Ship: 0	None	None	Replacement	N/A
		With Family	Not Applicable							
	Contractual Employee Appt. 3 Months to Less Than 1 Year	Employee Only	1,000 lbs./454 kgs. net	200 lbs./91 kgs. Gross	N/A	Ship: 0	30 Days	None	\$60,000	N/A
		With Family	2,000 lbs./909 kgs. Net	300 lbs./136 kgs. Gross	N/A	Ship: 0	30 Days	None	\$90,000	N/A
	Contractual Employee Appt. 12 Months or More	Employee Only or With Family	One 20-ft. Container containing a maximum of 8,000 lbs/3,636 kgs. Net	500 lbs./227 kgs. Gross	N/A	Ship: 0	30 Days	None	\$120,000	N/A
Non-HQ-based Staff	Staff Assigned to Overseas Offices	Employee Only	One 20-ft. Container containing a maximum of 8,000 lbs./3636 kgs. Net	500 lbs./227 kgs. Gross	N/A	Ship: 1	90 Days	Remainder	\$120,000	Full Replacement/ Declared Value
		With Family/Domestic Partner	One 40-ft. Container containing a maximum of 15,000 lbs./3636 kgs. Net	500 lbs./227 kgs. Gross	N/A	Ship: 1	90 Days	Remainder	\$180,000	Full Replacement/ Declared Value
	Resident Representative	Employee Only	1,500lbs./681 kgs. net	500 lbs./227 kgs. Gross	250 lbs./113 kgs. Gross	Ship: 1 Store: 2	90 Days	Remainder	\$120,000	Full Replacement/ Declared Value
		With Family	1,500 lbs./681 kgs net + 500 lbs/227 kgs. Net for each eligible dependent	500 lbs./227 kgs. Gross	250 lbs./113 kgs. Gross	Ship: 1 Store: 2	90 Days	Remainder	\$180,000	Full Replacement/ Declared Value
	Long-Term Technical Assistance Experts	Expert Only	None	500 lbs./227 kgs. Gross	N/A	N/A	30 Days	None	\$5,000	N/A
		Expert With Family	None	1,000 lbs./454 kgs. Gross	N/A	N/A	30 Days	None	\$15,000	N/A
Individual Study Program	External Assignment less than 6 Months	Employee Only	None	200 lbs./91 kgs. Gross	N/A	Ship: 0	30 Days	None	\$5,000	N/A

	Personnel Type	Persons Relocating	Surface Entitlement	Air Entitlement	Office Shipment	No. of Autos Store/Ship	Storage in Transit	Permanent Storage	Transit Insurance	Storage Insurance
		With Family	Not Applicable							
	External Assignment 6 to 18 Months	Employee Only	1,500 lbs./681 kgs net	300 lbs./136 kgs. Gross	N/A	Ship: 0 Store: 1	90 Days	Remainder	Replacement	Full Replacement/ Declared Value
		With Family	1,500 lbs./681 kgs. Net + 500 lbs./228 kgs. Net per Dependent	300 lbs./136kgs. Gross + 100 lbs./45 kgs. Gross per Dependent	N/A	Ship: 0 Store: 1	90 Days	Remainder	Replacement	Full Replacement/ Declared Value
	External Assignment 18 Months	Employee Only	3,000 lbs./1363 kgs.	300 lbs./136 kgs. Gross	N/A	Ship: 0 Store: 1 *Can ship within cost of storage	90 Days	Remainder	Replacement	Full Replacement/ Declared Value
		With Family	3,000 lbs./1363 kgs. + 1,000 lbs./454 kgs. Net per Dependent	300 lbs./136kgs. Gross + 100 lbs./45 kgs. Gross per Dependent	N/A	Ship: 0 Store: 1 *Can ship within cost of storage	90 Days	Remainder	Replacement	Full Replacement/ Declared Value
	ISP II (Full/Half Pay, ISP IV (Leave without pay) Up to 6 Months	Employee Only	None	200 lbs./91 kgs. Gross	N/A	None	30 Days	None	\$5,000	None
		With Family	Not Applicable							
	ISP I & II (Full/Half Pay) 6 to 12 Months	Employee Only	1,500 lbs./682 kgs. Net	300 lbs./136kgs. Gross	N/A	Ship: 0 Store: 1	90 days	Remainder	Replacement	Full Replacement/ Declared Value
		With Family	1,500 lbs./682 kgs. Net + 500 lbs./227 kgs. Net per dependent	300 lbs./136 kgs. Gross + 100 lbs./45 kgs. Gross per dependent	N/A	Ship: 0 Store: 1	90 Days	Remainder	Replacement	Full Replacement/ Declared Value
	ISP IV (Leave without Pay) 6 to 24 Months	Employee Only	1,500 lbs./682 kgs. Net	300 lbs./136 kgs. Gross	N/A	Ship: 0 Store: 1	90 days	Remainder	Replacement	Full Replacement/ Declared Value

	Personnel Type	Persons Relocating	Surface Entitlement	Air Entitlement	Office Shipment	No. of Autos Store/Ship	Storage in Transit	Permanent Storage	Transit Insurance	Storage Insurance
		With Family	1,500 lbs./682 kgs. Net + 500 lbs./227 kgs. Net per dependent	300 lbs./136 kgs. Gross + 100 lbs./45 kgs. Gross per dependent	N/A	Ship: 0 Store: 1	90 Days	Remainder	Replacement	Full Replacement/ Declared Value

Attachment III. Comparator Table

	IMF Proposed	World Bank/IFC	IADB
1. Lump sum (a) How calculated? (b) Based on family size? (c) Other assistance? (d) Supporting documents?	(a) Average costs for domestic & international over a 4 yr period. (b) Yes (surface only) Excess Baggage Grant): \$500 domestic; \$2,000 international <i>Appointments, separations & transfers to/from overseas posts (1 year or more):</i> <u>International:</u> <u>Domestic:</u> Single : \$8,000 Single : \$ 6,000 Family: \$14,000 Family: \$10,000 (c) <u>Auto Shipment/Storage Grant for Resident Representatives:</u> \$8,400 (round trip) (d) No documents required	(a) Average costs for inter-continental & intra-continental over the 4 yr. period. (b) Yes (surface only) Excess Baggage Grant (all): \$1,800 <i>New Hires and Terminations:</i> <u>Inter-continental moves:</u> <u>Intra-continental moves:</u> Single: \$10,000 Single: \$8,000 Family: \$14,000 Family: \$12,000 <i>Between assignment¹ :</i> <u>Inter-continental moves:</u> <u>Intra-continental moves:</u> Single : \$13,000 Single : \$11,000 Family: \$17,000 Family: \$15,000 (c) i. <u>Optional Auto Shipment Grant:</u> \$4500 (one-way) only when household goods are shipped via WB ii. ½ of insurance over \$200,000 (d) No documents required	(a) Lump sums are yearly cost averages for single and married staff - reviewed every few years and revised if necessary. (b) Yes <i>Appointment and change of duty post <u>only</u>.</i> <u>Appointments</u> Single: \$6,000 Family: \$9,000 <u>Change of duty post²</u> Single: \$10,000 Family: \$15,000 (c) Additional \$250 grant to cover air shipment etc. (d) No documents required. Note: About 33 percent take the lump-sum option.
2. Service by contractor or Lump sum (a) Conditions? (b) Combine?	(a) Either lump-sum cash option or shipping through contractor. (b) Cannot Combine	(a) Either lump-sum grant or shipping through contractor. (b) Cannot combine.	(a) Cannot use lump sum for repatriation (b) Cannot combine
3. Separate lump sums cover : (a) air (b) surface (c) automobile (d) Perm. Storage	(a) Yes (excess baggage) (b) Yes (c) Yes (d) Yes	(a) Yes (excess Baggage Grant) (b) Yes (c) Yes (d) Yes	(a) Yes (b) Yes (c) Yes (d) Not authorized
4. Policy re excess entitlement	Staff member to pays contractor 100 percent	Staff member pays contractor 100 percent	Staff pays directly to contractor.

¹ Includes costs for surface freight for household goods; surface freight for cars; extended storage; in-transit storage for car and household goods, transit insurance, furniture and equipment allowance payable under overseas assignment benefit

² Higher lump sums offered as incentive for staff to take overseas assignments