



Destination Services Manual

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Welcome!

We are very pleased that you have agreed to join our team as an IOR Destination Services Consultant. We look forward to your contribution to our company!

IOR Global Services is a leading provider of global mobility and talent management solutions designed to advance employee effectiveness across cultures. We take a personal approach in delivering destination services, language training and translation, intercultural training and assessment tools all around the world. IOR provides unrivaled quality for our clients through our responsiveness, flexibility, and problem-solving capabilities for over 38 years.

As a **Destination Services Consultant** (DSC), you join a global staff of more than 500 consultants operating in more than 20 different countries. You have been hired because you are an expert in your area, and possess the qualities we seek in our DSC's. As the local representative of IOR Global Services you are "IOR" to the assignees, most of whom we will never get to meet. We look to you to make these families and individuals feel welcome in their new location and to ease the stress of their international move. Both IOR staff and the assignee will look to you to provide specific details unique to your location.

During your work with us you will be asked to assist relocating families with many different tasks. This assistance may include advice or assistance with: home finding, school selection and registration, local registration, driving license, banking, health care, transportation, shopping, recreation and community orientation.

The process of moving to a foreign country is very stressful, especially when children are involved, and there are many decisions to be made. Your assistance to these families is so important as you help them make decisions about the neighborhood, home and school which will best meet their family's needs during their time in their new country. You are an important local expert who can provide the information they need to make informed decisions. Because you are likely the first person they know in their new location, you often become their contact for all the details involved with their move. While the focus of your assistance should always be the service you have been authorized to provide, you will also be providing them with a friendly face and a smile in their new hometown. Helping them to feel welcomed to their new city is often as important as helping them find the right house or school.

Welcome to this wonderful and satisfying work!

Cheryl Hart, CRP, GMS
Director, Destination Services





Description

IOR Global Services is a leading provider of global mobility and talent management solutions designed to advance employee effectiveness across cultures. Since 1979 we have provided services to expatriates and their families, pioneering many programs that are today considered standard international employee benefits.

Mobility Services

- Destination Services: 500+ DS consultants in the US and select countries, including 44 States throughout the US.
- Intercultural Training & Repatriation Workshops
- Language Training & Translation: Individuals, Groups, Intensive Programs, 1,000+ language trainers in 70+ countries, including all 50 US states

Company Background

Ms. Noel Kreicker founded **International Orientation Resources** in 1979. In July, 2010, IOR Global Services was purchased from Ms. Kreicker by Kendra Mirasol, who joined IOR in 2006, and Rob Burns, an entrepreneur. Ms. Mirasol is a multi-lingual former expatriate with extensive management experience. Mr. Burns has experience in developing and managing global client relationships, advising companies on strategic transactions, building and leading global teams and has further strengthened IOR's management team.

IOR's office is in Northbrook, Illinois, (a suburb of Chicago), with additional staff in Detroit, Michigan and Des Moines, Iowa.

IOR employs a full-time staff of over 30 professionals who bring expertise from expatriate experiences in a wide variety of cultures. Their advanced degrees include: International Business, Communications, Cultural and Applied Anthropology, Linguistics, Adult Education, Labor and Economics, Corporate Training and Development, Industrial and Organizational Psychology, and Curriculum Design. IOR provides an outstanding resource center with extensive materials on over 60 countries and a network of more than 2,000 country experts. For more information, visit our website at www.iorworld.com



Overview of Responsibilities

As an IOR Destination Services Consultant (DSC), you will assist international as well as domestic assignees in the process of relocating. Your assignees will be on assignment ranging from a few months to a permanent transfer. Here are a few “types” of programs that you will receive.

Direct Arrival to Destination

Typically, the Assignee will arrive at their designated/host city and will have approximately 30 days of temporary housing. This housing is set up by the Relocation Management Company (RMC) or Direct Client and not by IOR. If rental home finding is authorized, it is your responsibility to support with everything from securing a realtor (if necessary), identifying properties, helping with lease negotiation, and property inventory. When settling in services are also authorized, you will assist with accompanied support to open a bank account, Social Security application and Driver’s License application and other additional tasks. You may assist families with school support, when needed.

Pre-Trip Visit

This usually occurs when the Assignee visits your area for up to a week, approximately one to two months prior to the actual move. Called the “pre-assignment trip” or “look-see trip”, it is an opportunity for the Assignee and spouse, if applicable, to see the area and choose a place to live. Your tasks may include area tour/orientation, property viewings, finalizing housing choice, banking and possible school viewings. After the pre-assignment trip, the Assignee typically returns to the home country for a period of time. **Please be sure to be mindful of your program time used during this visit. You want to make sure enough time is saved for the return.**

Return to Destination

Upon the Assignee’s return to the host country after the Pre-Trip visit, you will continue to work with the Assignee, assisting him/her with rental housing, move-in details, local government registration, school registration and obtaining a driver’s license, as authorized. The local orientation includes introducing the Assignee, spouse and children to resources and activities which match their interests and needs.

Departure Services/Repatriation

Once the job assignment is completed, IOR will assist with the move out procedures, final walk through, deposit returns, and coordination of closing out of utilities, banking, school records, etc.



IOR Professional Culture

CONFIDENTIAL

The following guidelines are confidential and for the use of IOR Consultants only.

1. Dress in a business-like fashion and be on time and organized.
2. Maintain copies of all correspondence. Keep detailed records of dates, times, services provided for the Assignee on your Status Report, which must be e-mailed to your DPM after each face to face meeting. (These Status Reports must maintain their original file name – you add to the same report each day.)
3. All correspondence requires the following subject line naming convention:

Assignee's Company name/ Assignee Last name, First Name/ File number if one is provided/General subject (i.e. Rental Payment)

4. A Signature Block identifying you as the IOR DSC is required for email as well as your cell phone, and IOR's Privacy Policy Statement. Please follow the example using the color/size format as follows: (use dark orange, Arial in Bold, font #12 for your name; Bold IOR Global Services and dark navy for the rest, Arial, font # 10).

Your Name Here

Destination Services Consultant

IOR Global Services

Your Cell Phone #

Your email

www.iorworld.com

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5. You are the expert on your city. Be confident about your skills, knowledge, and contacts. This will assure the Assignee that you are capable and that they can benefit from your assistance. If you are working for IOR for the first time, we request that you **do not tell the Assignee that they are your first assignment**, unless we have notified the client company of that fact. If you are asked a question and you are not sure of the answer, please tell your assignee that is a "great question", and you will get an answer, as soon as possible. Call your DPM.



6. Stay on task concerning your role as the consultant and keep your conversations ‘assignee centered’. Exercise good boundaries in your relationships and stay task focused. Friendships may arise from the key role you have in easing their transition. You may choose to encourage this or not.
7. When offering information to the Assignee, use phrases such as “in my opinion”, “I recommend”, “I suggest”, or “how would you feel about” and remind them, “It is your choice.” Do not use phrases like “you should”.
8. It is extremely important to maintain **regular communication** with your IOR Destination Program Manager. IOR’s policy is to be proactive—anticipating, identifying, and resolving situations rather than reacting to a crisis that could have been avoided. When in doubt, call, rather than make an error regarding a decision involving a transferee. Should a situation arise outside normal business hours requiring immediate attention, contact your DPM’s cell number.
9. Establish and maintain a file system of facts and information you gather for future use with your assignees. Examples follow: list of Driver’s License requirements, school registrar contact information/website, the International Club contacts, library resources, etc.
10. If you are within 4 hours of your allotted program time and you are concerned it may not be sufficient to complete the remaining tasks, contact your DPM. Additional program time (rarely granted) or coaching on use of remaining time, will be addressed.
11. If you sense the Assignee is not needing the full program time authorized, contact your DPM for further guidance.
12. Please do not contact the Authorizer directly! Only the IOR Destination Program Managers interface with the client companies/RMC and the authorizers. If you need to be in contact with the corporate client/RMC, you will receive this information in your Program Confirmation email.
13. The **compensation** and benefits of IOR staff members **is confidential** and must not be discussed with anyone outside IOR. This includes keeping the Program Confirmation document confidential.
14. Destination Services Consultants **may not accept commission or monetary gifts** from a company having a supplier or vendor relationship with IOR (i.e., landlord, estate agent, realtor, furniture rental store, banks, insurance companies or individuals who have received our referrals, etc.). However, accepting small gifts such as flowers or coffee gift cards is fine.



15. When including a lunch/snack break on your Agenda, select a Panera or Subway type of business offering fast counter service for independent ordering. Your rate from IOR is calculated to cover your lunch, coffee and incidentals for the day. However, if the family invites you to lunch as their guest, it is okay to accept.

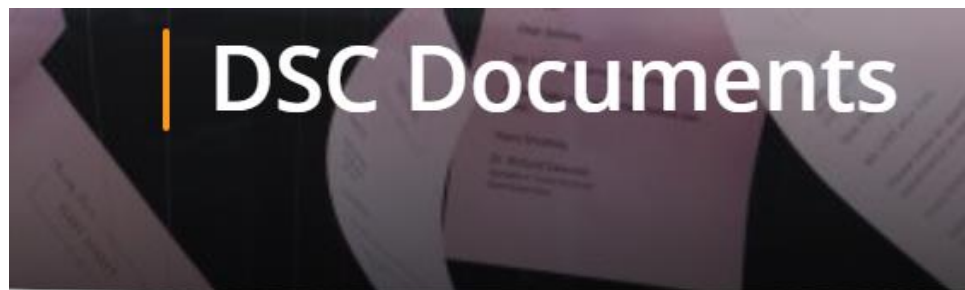
| IOR Contact Info | | | |
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IOR's Website - Procedures Portal

Login to access a library of all documents, webinars, and resources. www.iorworld.com

- Upper right **LOGIN**
- User name: iords
- Password: procedures

Sample of documents available on the IOR Website



[Meet our Team](#)

[Order IOR Business Cards](#)

[IRMA](#)

[Program Documents](#)

DSC Documents

- [DSC Email Templates](#)
- [Status Report](#)
- [Status Report With Hours](#)
- [Assignment Checklist](#)
- [Lease Payment Information Form \(if Corporate Lease or Non US Lease\)](#)
- [Property Inventory - English](#)
- [Property Inventory - Spanish](#)



IRMA and Accessing your programs

IRMA (Integrated Resource Management Application) is IOR's consultant database that allows you to manage your profile information so that IOR's Program Managers can work with you on your authorized programs. This information is private and only your bio, photo and contact information may be shared with our clients.

IRMA will allow you to:

- Create and update your profile
- View your open and closed programs
- Upload your final supporting program documents, enter hours spent, receipts, etc.
- Close and invoice your programs

To Access IRMA and create your own password:

- Click this link <https://irma.iorworld.com/login>
- Click "Reset Password"
- Enter your email and click "Reset Password."
- You will receive an email from developers@iorworld.com (check spam for email)
- Click on the link to create your password, and login with email/new password.

Open Program Sample View

Your Programs Help Account

Destination Services

[Open Programs](#)
[View Closed Programs](#)

| Assignee | Company | RMC | StartDate | Program Manager | Program Key | Action |
|----------|---------|-----|-----------|-----------------|-------------|--------|
|----------|---------|-----|-----------|-----------------|-------------|--------|



Program Confirmation

From: IOR Destination Program, DPM@iorworld.com
Sent: Wednesday, May 30, 2018 2:05 PM
To: Destination Services Consultant <DSC@iorworld.com>
Subject: CONFIDENTIAL Royal Family_Relocation Management Company (RMC) / Prince William DSC Confirmation

| | | |
|---|--|---------------------------------------|
| 00 Pre Arrival Checklist for USA - IOR.DOCX 448 KB | 00 Preliminary Agenda - IOR.docx 637 KB | 00 Status Report - IOR.docx 646 KB |
| 00 Property Inventory - IOR.docx 966 KB | Communication Tools for Consultants 2017.pdf 447 KB | |

Program Confirmation P-ABC-18-WILL-HARR-54321:DS1

Dear Destination Services Consultant (YOU),

Thank you for accepting this IOR Destination Services program:

| | | | |
|---------------------|--|----------------------|---|
| Authorization Date: | 05/29/2018 | Programkey: | P-ABC-18-WILL-HAR-54321:DS1 |
| Company: | RMC/Royal Family | Authorizer: | MeghanMarkle@relomanagement.com |
| IOR DPM: | Name of your DPM If urgent and after CST business hours, please call my mobile phone #: _____ | Home Country: | London, UK |
| | | Host Country: | Los Angeles, United States |
| Assignee: | Prince William (moving with family) | Assignee Contact: | [phone] 1-222-3333 PrinceWilliam@kensingtonpalace.com |
| Program Type: | 4 Days DS; Area Tour, Home Finding and Settling In Support | Program Rate*: | USD 1000.00 |
| Welcome Packet: | N/A | Welcome Packet Rate: | USD 0.00 |

*if DS program is completed in less time than authorized, the appropriate consultant rate will apply. Please check with your DPM.



Notes from DPM:

Prince William is in Los Angeles for business trip through June 3rd and would like to start home search/school search in advance of final move. He is interested in Rancho Palos Verdes and the British School for his two school age children.

Prince Williams' Relocation Questionnaire can be found here: [\[surveylink\]" style="background-color: yellow;">\[surveylink\]](#)

****REMINDERS BEFORE CONTACTING YOUR ASSIGNEE:**

- Please contact your Assignee **WITHIN 24 HOURS OF BEING INTRODUCED** and attach the **PRE-ARRIVAL CHECKLIST** (attached)
- Please send the **PRELIMINARY AGENDA** (attached) to Assignee and copy DPM and Authorizer **IN ADVANCE OF** face-to-face meetings
- Please email your DPM an updated **STATUS REPORT** (attached) any time you meet in person. Final status reports must be uploaded into IRMA when the program is complete
- If Home Search support is authorized, please send all leases to your DPM for IOR review prior to Assignee's signing lease
- If applicable, please find **CLIENT-SPECIFIC FORMS** attached
- Please identify in your email subject line: **Company name / Assignee Last Name / File # if specified / Specific Call to Action**
- Copy DPM and the Authorizer **ON ALL EMAILS** to the Assignee
- DSC/IOR-related questions should be directed **TO YOUR DPM ONLY** (NOT to the Authorizer/Client)

HOW TO CLOSE YOUR PROGRAM AND GET PAID:

In order to close your program and get paid, all applicable program documents must be uploaded to [IRMA](#). Please upload your final Status Report and if applicable: signed Lease, signed Property Inventory with photos, as well as any required client-specific reports in order to be compensated for your services.

Log in here: [IRMA](#)

Username: Your e-mail address

Password: your private password

Feel free to contact me at any time throughout the program with questions or concerns.

Your Program Manager, GMS

Destination Program Manager

IOR Global Services

Phone: +1 224.123.4567

Email/Skype: dpm@iorworld.com

www.iorworld.com



First Email to Your Assignee (Sample)

Within **24 hours** of your introduction, you will email the Assignee using an [Email Template](#) with the key points as outlined in the template options below. Use **Subject Line and Signature Block** as previously indicated in **IOR Professional Culture** section.

Please personalize by changing and modifying the templates below based on the Assignee's info, the details of the program, your usual email font and the tasks you have been hired to do.

Inbound Programs

Intro Email: First Contact with Assignee

Template 1: When your DPM is allowed direct contact with Assignee (most common)

Dear (Assignee),

My name is (name) and I will be assisting you as your IOR Global Services Destination Services Consultant in your upcoming move to (city, state or area). My job is to help you with (task), (task), (task), any documentation you need, etc. to help you (and your family) settle into the (area, state or city) as easily and successfully as possible!

My understanding from (DPM's name), your IOR Destination Program Manager, is that your housing budget is (\$), that you would like to live in the (specific city or area) area and that you (your spouse and children) are planning to arrive (date). (If rental search is not included, modify this paragraph to include other details about the assignee's situation provided by your DPM)

I would like to arrange for a phone call to talk with you before you arrive. Would you be available to call me at my number below at (date) and (time). Let me know and I will be available for your call. (Utilize Skype or other method of talking you prefer. This paragraph can be changed to arrange for the first face to face appointment when there is no time for a call)

I look forward to hearing from you as soon as possible.

Best Regards,

Your name here

Destination Services Consultant

IOR Global Services

Phone: +1.555.555.5555

your email@youreemail.com

www.iorworld.com

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First Email to Your Assignee (Continued)

Template 2: When you are the only IOR contact with Assignee & IOR DPM is not allowed direct Assignee contact (less common)

Dear (Assignee),

My name is (name) and I will be assisting you as your IOR Global Services Destination Services Consultant in your upcoming move to (city, state or area). My job is to help you with (task), (task), (task), any documentation you need, etc. to help you (and your family) settle into the (area, state or city) as easily and successfully as possible!

My understanding from (RMC/ Authorizer Name), is that your housing budget is (\$), that you would like to live in the (specific city or area) area and that you (your spouse and children) are planning to arrive (date). (If rental search is not included, modify this paragraph to include other details about the assignee's situation provided)

I would like to arrange for a phone call to talk with you before you arrive. Would you be available to call me at my number below at (date) and (time)? Let me know and I will be available for your call. (Utilize Skype or other method of talking you would prefer. This paragraph can be changed to arrange for the first face to face appointment when there is no time for a call)

I look forward to hearing from you as soon as possible.

Best Regards,

Your name here

Destination Services Consultant

IOR Global Services

Phone: +1.555.555.55

your_email@youreemail.com

www.iorworld.com

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Pre-Arrival Checklist

When you are supporting an international move, you will email the Assignee the [Pre Arrival Checklist](#) attached in your Program Confirmation by the DPM. It is also found in the IOR Procedure Portal on our website at www.iorworld.com.

While this is a thorough list, it is not exhaustive, and some items vary depending on the needs of the assignee and his family. Also, important to keep in mind is that requirements from various regulatory agencies change frequently, and sometimes without much notice.

This checklist is also offered in Spanish, Portuguese, Japanese and French, if needed, for assignees relocating to the U.S.



Welcome Packet

If a Welcome Packet has been authorized on the Program Confirmation, please gather information and assemble a document folder with materials to present to your client/family during your first face to face meeting. Welcome packets should be tailored to the needs of the family and may include a small local welcome gift and fun activity items for the children. Below are suggestions for information to include.

*** If there is a City Guide and/or Rental Market Guide for your location, it should be included in the attachments with your Program Confirmation. If one is not included, please check the IOR website Procedures Portal where all available City Guides are listed. The electronic version should be shared with your Assignee, and can be uploaded to an iPad, Mac or PC as it contains informative links. ***

General Area Info

- City specific materials- “Tourist” type info about what to do with kids, or families
- Map of the area– leads to discussion of work location, home finding area, school preferences based on location etc.
- Public Library information
- Restaurant Guide/ Local Newspaper
- Shopping Malls info
- Local park and recreation guide
- Public transportation info: is this a viable option for travel to work, shopping etc. or will a car be needed by a family? Transportation to school info.
- Local hospital and convenient care locations
- Emergency contacts, how to use 911 and 411 in the U.S.
- Local weather info and preparation for severe local weather.
- Rules of the Road from your state Department of Motor Vehicles (DMV)
- Driving info for specific instances. US examples include when a police officer stops you, when you approach a school bus, at red-lights or 4-way stops, using cell phones, DUI, seat belts, car seats, etc.
- List of public holidays when schools, stores and offices will be closed
- Time change information as appropriate. In many US locations Daylight savings time and when it changes to Standard time is important to share.
- Translation of Celsius and Fahrenheit temperatures
- Tip chart for quick reference for use with service workers (restaurant, etc.)



Preliminary Agenda (Sample)



Preliminary Agenda

Assignee:

Location:

Date:



ANETTE STIFELMAN
Destination Services Consultant
IOR Global Services
Phone: +1 847.224.4528
Email: aws1800@gmail.com



Preliminary Agenda (Sample)

| TIME | ACTIVITY: Home finding, Settling in, School Tour, Area Tour, etc. | Notes |
|------|---|-------|
| | Address: # of Bedrooms: Square Footage: Price: Property Link: | |
| | Address: # of Bedrooms: Square Footage: Price: Property Link: | |
| | Address: # of Bedrooms: Square Footage: Price: Property Link: | |
| | Address: # of Bedrooms: Square Footage: Price: Property Link: | |
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Assignment Checklist (Sample)

There are a wide range of services that may be addressed by your IOR Consultant as authorized program time permits. Your Consultant will review the specific tasks and services you can anticipate receiving from your authorized program.

Area Tour

- Welcome Packet
- Area Tour/Orientation
- May include housing research or appointments

School Assistance

- School research
- Schedule school visits
- Assist with registration/enrollment
- Information on required records

Home-Finding

- Property research and appointments
- Accompanied viewings
- Non-legal Lease Checklist provided by IOR
- Accompanied Walk Thru to complete Property Inventory with photos
- Furniture rental information
- Assistance/Information on utility connections
- Orientation to the property, appliances, etc.

Settling-In Assistance

- Social Security
- Bank Account
- Driver's License/Driving Schools
- Medical Information
- Renter and Auto Insurance Information
- Community Orientation
- Shopping/Hobbies



The Letter of Employment

Because an international assignee may not have a credit history in their destination country, a Letter of Employment (LOE) is often necessary to enable them to secure a lease, bank account, etc. In many locations, this letter is extremely useful to show evidence of the Assignee's employment and income to a prospective landlord. It may also be helpful when opening a bank account or setting up utilities.

The Assignee can obtain this letter from their employer on their company letterhead. It should contain the following elements:

- Assignee name, job title and brief job description
- Statement that the Assignee has been relocated at the employer's request
- Length of time with employer, if greater than 3 years
- Assignment start date and duration
- Assignee salary and bonus amount, if relevant, in local currency
- Any allowances offered by employer for housing, utilities, furniture, etc. Can be combined into a "living allowance" for the purposes of this letter.
- If a rental fee needs to be paid in this particular area, note whether the Assignee or employer funds this payment
- Name and contact information for someone from the employer who can verify the information in the letter

The Assignee should have an original copy of this letter, on company letterhead, with a signature. See sample [Letter of Employment](#). An electronic version will also be helpful in case the information needs to be sent via email. ***The information in the LOE is confidential*** and you will want to reassure the Assignee it will only be used for necessary documentation related to his banking and housing needs.



First Face to Face Meeting with Your Assignee

Be sure that you have contacted your Assignee the day/night prior to this meeting to welcome them and to re-confirm the meeting arrangements. If children will be present, make sure the Assignee is informed about child safety restraint laws and confirm car seat arrangements in advance of first meeting.

- Be on time!
- Bring your business cards
- No cell phone use in car
- Make sure your car is presentable and comfortable
- Always wear your seat belt and make sure everyone does as well.
- Bring water/snacks for your passengers when anticipating extended time on the road.
- Bring a copy of your Preliminary Agenda for review
- Share Welcome Packet (if authorized on Program Confirmation)
- If supporting home finding, review home finding procedures including Lease Checklist by IOR
- Advise Assignee not to sign anything or pay fees without first consulting you.
- Leave the hotel/ temporary housing/assignee office location with enough time to reach your first appointment



Sample Email After First Face to Face Meeting

Dear (Assignee),

It was a pleasure meeting you and your (spouse/children) today. I am glad we were able to (open a bank account, view properties, and/or visit the schools of your choice).

I know that we have remaining tasks to accomplish together, but the purpose of my email is to touch base to make sure you felt that today's priorities were accomplished to your satisfaction.

Please let me know if you have any questions or if I can be of further service. My goal is your complete satisfaction, so feel free to reach out and let me know if there are any changes I can make that would more effectively meet your needs.

Thank you.

Best Regards,

Your name here

Destination Services Consultant

IOR Global Services

Phone: +1.555.555.5555

your email@youreemail.com

www.iorworld.com

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Area Tour/Orientation

- Provide orientation to community resources
- View sample rental properties when it's a Pre-Trip
- Stop at points of interest
- Include practical locations; shopping, medical facilities and tourist highlights



Rental Housing

Housing is usually the Assignee's top priority. Your Assignee will be eager to begin viewing rental housing, as soon as possible. Jet lag may affect the length of the Assignee's first appointment with you, therefore, be sensitive to the Assignee's needs in this regard.

Assignees may express a preference to view rentals on the weekends or evenings due to work commitments. Please let your Assignee know that many apartments are unavailable for viewing in the evening. Due to the competition of viewings on the weekend, greater opportunity to secure a rental will occur during the week. Schedule time for a quick coffee break or lunch if you are going to be out all day as well as bring snacks/ water in your car. See IOR's suggested lunch policy in **IOR's Professional Culture** section.

If the Assignee expresses interest in making a purchase, contact your DPM immediately for appropriate guidance. Some Relocation Management Companies have their own network of realtors that the Assignee is to use. Do not assume you can direct this process.

Rental Budget Considerations

- Be sure to confirm with your DPM and/or Program Confirmation, the housing budget and who is responsible; Assignee or Company
- If realtors are used for rental search in your area:
 - Determine who is responsible for realtor fee/commission; tenant or landlord
 - Clarify in advance, commission payment and how that fits in with the Assignee's budget
 - Obtain a clear explanation of where the funds are going and what they cover (i.e., rent, realtor commission and security deposit).
- If Company is providing housing budget/allowance, clarify what it includes (i.e., rental furniture and realtor fees). Find out if there is a preferred vendor you must contact.
- IOR does not advise the Assignee to sign a lease without a work visa due to potential financial obligation in the event of visa delay or denial
- Show only properties within the housing budget
- When Company subsidized, contact your DPM if:
 - After viewing properties within the budget, your assignee asks to see housing that exceeds the Company paid budget or housing allowance.
 - Your assignee tells you that he/she is exempt from "normal" company policy.
 - The family's basic needs cannot be met within the allowance, i.e., no housing is available within the budgeted amount.



Rental Area/Neighborhood Considerations

- Give careful consideration to safety, schools, commuting distance, location to green space, etc.
- If your Assignee has indicated on the questionnaire a preference for a particular area or community, make every effort to find **as many choices within that location as possible**.
- If your assignee has found rentals online
 - Confirm availability
 - Schedule appointments
 - Provide guidance on properties as they relate to school requirements, safety concerns, commute time, etc.

Rental Resources

Region in the country and city size determines the availability of the following property search options:

Property Management Firms

- Not all property management firms multi-list their houses/apartments.
- Call and/or check property management websites for rental housing options.
- Some property management firms have specialties; i.e., a certain price range, amenities and desirable area locations.
- Identify a list of companies and designated contacts to check availability for your rental searches.

Online Resources

- www.realtor.com, www.apartments.com, www.trulia.com and www.Zillow.com, etc.

Apartments/Townhomes

The Destination Program Manager and/or the Assignee might inform you that an apartment is preferred instead of a house.

- In some areas, apartments are multi-listed and shown by realtors, just as rental houses are.
- Sometimes property management firms represent apartment rentals.
- Or you may have to call the apartments individually to find out availability, pricing and scheduling a viewing.
- Apartment complexes may have furnished properties or shorter-term leases.



Realtors

In some areas, a home listed for lease with a real estate company is “multi-listed” meaning that the information regarding the house is entered into a computer data base which can then be accessed by any realtor. This is commonly referred to as the MLS.

To show your Assignee some available rental properties, you will need to make an appointment with a real estate agent. Consider the following when scheduling:

- Use a realtor who is professional, reliable, thorough, and responsive.
- If the realtor is not familiar with IOR, immediately advise him/her that you do not receive commission or a referral fee when acting in the capacity of an IOR DSC. Also explain that finding rental housing is only one area in which you assist your Assignee and that you are compensated directly by IOR.
- Make sure the realtor understands the transfer/ buyout/ diplomatic clause
- Inform the realtor of all relevant data about your Assignee: housing allowance, length of assignment, family size and children’s ages, pets, smokers, assignee’s work location, any special considerations, and area of choice indicated by the Assignee (but do not limit search to this area).
- Advise the realtor that you do not want your Assignee to be shown any properties whose rent exceeds the housing allowance, or whose landlord will not accept a transfer clause. If the realtor indicates that the price on a property may be negotiable and thereby meets the budget, ask that it be confirmed before showing the house to your Assignee. Be sure to advise your Assignee of the situation.
- Realtors work on commission, and if you have one realtor showing you properties one day and a different realtor showing you houses the next day, you will encounter overlap problems resulting in very angry realtors.
- If you have two clients in a row in the same housing price range, it’s probably a good idea to work with the same realtor, provided you were satisfied with his/her effort and if he/she is available. This eliminates leasing a property with one realtor that was shown to you first by another realtor.



Helpful Rental Details

The Lease

- Often a landlord will not allow an assignee to sign a lease without a Visa and IOR strongly encourages this
- Majority of leases are 12 months, paid monthly
- A Security Deposit is required at time of lease signing with first month's rent
- Transfer/Break /Buyout/Diplomatic Clause is not standard until after first year. With any lease over 12 months we must do everything we can to ensure a clause is in place.
- It is RARE that monthly rent would include utilities.
- Rentals conveyed 'As Is', therefore, any changes, improvements or repairs to the property must then be agreed to in writing
- Realtor commission, if applicable, is typically paid by the landlord; exceptions are NY and other eastern locals

Utilities, Furnishings and Move In

- Social Security number is typically needed to establish utilities in their name. If the SSN has not been received yet to provide to the utility companies, an additional deposit may be required or a Utilities Addendum.
- Furnished properties (with furniture) not typical in US => corporate housing
- Properties typically include appliances and cabinets but NO furniture or housewares
- Timing of household goods arrival may necessitate short term solutions
- Be prepared to provide suggestions for rental furniture options and/or furniture purchases. Check with your DPM for preferred providers for rental items.

Suggestions for Cost Savings from current DSC's are below

- *I negotiated the rent to include yard maintenance and pool maintenance*
- *I negotiated the monthly rent to include all new appliances*
- *We saved 15 days of rent by negotiating and changing the moving in date.*
- *I was able to get the deposit back for the assignee in spite of breaking the lease.*
- *Client expressed concern that it was difficult to take time off at work, and he had some anxiety about taking the written exam at the DMV. I suggested he take an online course, and he passed on the first try!*
- *The building he chose had a fitness center saving several hundred dollars a year in gym fees.*
- *Bundling car insurance and required apartment insurance saved money*
- *Client received one month free.*



Understanding the Lease

Be certain you know, in advance of the lease process, **who** will be signing the lease. Corporate leases may have certain requirements from their legal department and may require a review within the organization. A personal lease may have requirements from the organization, too, or may be the full responsibility of the Assignee. In either case, the Assignee's name and spouse's name should be listed somewhere on the lease as the tenant/occupant of the property.

Do not assume your Assignee realizes what is included and excluded in the rent.

- Make certain you explain fully any additional costs (such as real estate commission, utilities, taxes, maintenance, yard maintenance/snow removal, repairs, etc.)
- Before the Assignee moves forward with signing the lease, IOR completes the **IOR Lease Checklist** for the rental property with the intent that you review it with the Assignee to clarify any questions prior to signing.
- It is important that the Assignee has a clear understanding of his/her responsibilities under the lease, addendums and rules.

Inform your Assignee that a verbal agreement is not binding. A rental transaction is never complete until the lease is signed by both the landlord and the tenant, and the funds are received by the landlord.

- In real estate transactions, **'time is of the essence'**, particularly due to the competitive climate of rental properties in today's marketplace.
- If you feel there is some risk that the deal will not go through, warn your Assignee (and your DPM!).
- Once you have an agreement and have discussed the IOR Lease Checklist with the Assignee, schedule the lease signing, as soon as possible.

Common lease considerations

- Application process is streamlined when:
 - Application fee funds are available for payment
 - DSC attends the application process, when possible
 - A [Letter of Employment](#) on Assignee's company letterhead is presented with application, in lieu of a credit check for international Assignees



- Because rentals are 'As Is', if there are any improvements, concerns or on-going maintenance requests then:
 - These are typically written as an **addendum** to the lease. Based on the price and the condition of the house, the landlord may be willing to do these for the listed rental amount, or the tenant may have to offer additional funds.
 - Do advise your Assignee that he/she needs to be judicious about the requests he/she makes. Some landlords are happy to do anything requested, particularly if there is additional money involved. Other landlords are not anxious to do improvements. The Assignee needs to know that too many requests can jeopardize a lease agreement.
 - If you have real doubts that the landlord will turn over the house in a condition acceptable to your Assignee, be honest about your concerns with your Assignee. At that point, he/she may still decide to proceed with the rental but at least will have been forewarned. Specific requests for landlord follow-up should be included in the lease to ensure needed follow-up, if the Assignee chooses to move forward with the rental.

- Alert your DPM to any unusual clauses in the lease. IOR cannot encourage leases that will be controversial.
- Lease requirements relating to no smoking, no pets, and rules, etc., apply to guests as well as the tenant(s).



Important Clauses

Prior to lease negotiation, consider adding the following clauses to the lease:

Diplomatic/Transfer/Break/Buyout Clause

“Landlord agrees that if tenant is transferred out of the area for business reasons, this lease may be cancelled upon **60 days** written notice from tenant’s employer. Privilege will be granted to landlord and/or agent to allow showing the home to prospective tenant.”

- Rarely invoked because it is so expensive to move employees internationally, but essential to include in leases greater than 12 months
- Only applies if employee is **transferred** by his/her employer

If the lease contract does **not** contain a clause describing who is responsible to pay for repairs, it may be advisable to limit the Assignee’s exposure by adding the following clause (this is suggested wording):

Repair Limit

“The tenant will at his own expense pay the first \$_____ for each repair and/or service call after the first thirty days of this lease and occupancy date. This repair charge excludes built-in appliances, furnace, air-conditioning, hot water heater, roof repairs, basement leaks and sprinkler system unless these items are damaged due to tenant negligence.”

Utilities Transfer Addendum – USA Specific

Check with your utility company in advance of lease signing to determine whether the tenant’s SSN is required to sign up for utilities or whether the Assignee needs to apply in person. If either scenario applies, then request that this addendum be included in the lease:

“The tenant agrees to reimburse the landlord for pro-rated utility fees per lease requirements effective at lease start date. Further, the landlord agrees to hold the utilities in his own name until this transfer can be completed.”



When Assignee is leasing outside of the U.S.

- IOR's Lease Checklist is not required
- [Lease Payment Information Form](#) must be completed electronically, in lieu of the Checklist
- Itemize non-refundable fees. We must specify these because companies reimburse for some costs and not for others, i.e., cleaning fee, pet deposit, etc.
- If company is paying the rent, further approvals may be necessary and will be coordinated through your DPM prior to signing

When Assignees is leasing inside the U.S.

- Unsigned completed lease is forwarded to your DPM for the IOR Lease Checklist
- The non-legal IOR Lease Checklist provides a summary of the basic lease clauses outlining most tenant's responsibilities under the lease.
- Checklist will be returned to the DSC within 4-8 BUSINESS HOURS so that it may be reviewed with your Assignee.
- If company is paying the rent, further approvals may be necessary and will be coordinated through your DPM prior to signing

When Company is named in the lease or paying the lease

- Legal lease review by company may be required rather than the IOR Lease Checklist
- U. S. based companies require a completed W-9 form from the realtor or landlord (depending on where the check payments are directed)
- U.S. based companies require a completed [Lease Payment Information Form](#)
- Non-U.S. based companies may have further requirements, check with your DPM for specifics

After all requirements have been met as outlined above, proceed with scheduling the lease signing, as soon as possible. Then email signed copies of the lease, addendums and rules to your Assignee putting your DPM and Authorizer in copy.



Completing Home Finding Tasks

- Provide Assignee with utility company information
- Provide furniture suggestions, if needed
- Schedule the Walk Through with the Assignee and Landlord/ Rental Representative
- Complete the [Property Inventory](#) at Walk Through to document condition of rental (IOR's document or form provided by Landlord) and be sure it is signed by all parties
- Take photos to back up Property Inventory details
- Once Property Inventory is complete and signed, forward copies along with photos to the Landlord/Rental Representative, the Assignee, your DPM & Authorizer
- Provide Assignee the IOR [Rental Property Maintenance Tips Procedures](#) to encourage the Assignee to keep the property in good condition
- Make sure the Assignee knows what steps to take in the event of a maintenance emergency (i.e., how to shut off water valve and person to contact)



School Search

Families with children will often identify the school decision as their top priority. It is important that you maintain close communication with your Assignee prior to their arrival so you can educate them on their school choices and explain how housing location may impact school enrollment.

Explain the local school system and the impact of rental location along with various options that may include public, private, preschools, Charter, Magnet and International Baccalaureate programs in your area. There will most certainly be differences between the home country schools and the schools in the host location. Additional resources in the Procedure Portal [Helpful Documents](#).

To provide appropriate support, you will need to know in advance

- Ages of the children with birth dates
- Is Public or Private school preferred?
- Is an International Baccalaureate curriculum required for transcript continuity?
- Any unique requirements, i.e., sports, medical or scholastic concerns?
- For young children, determine if day care or pre-school environment is preferred.
- Are children's immunizations up to date and are their medical records translated for ease of enrollment?

When finalizing school choices

- Provide school research on selected schools
- Find out which documents will be required, including birth certificate, passport, signed lease/proof of residency, immunization records, and previous school records
- Schedule and accompany them on school tours

Assist with School Registration

- Make an appointment with school registrar to discuss enrollment procedures, i.e., fees, busing, classroom availability, meeting the teacher, etc.
- Help with any online registration tasks, if needed
- Provide follow-up support, assistance with school supplies and uniforms, as appropriate



Banking

- Check with local banks in your area for those that do not require a Social Security number or a permanent address to open an account. In the U.S., banks like Citibank and Bank of America are very accommodating to International Assignees.
- Inform the Assignee of the documents required to open a local bank account
- Make an appointment with an appropriate bank, i.e., one specified by the client company or one with international capabilities
- Does the bank offer any incentives for new customers?

Government Registration

- Assist your Assignee with any necessary registration specific to your area or country; Social Security number, social insurance number, police/city registration
- Research and advise which documents are required for registration/applications
- Accompany Assignee for support with processes

Driver's License

- Check the requirements/procedures in your area before advising the Assignee
- Communicate how long the Assignee can legally drive on home country license in your state
- Encourage Assignee to begin the process as soon as possible by providing study guides and test links
- Find out which documents your Assignee will need, including arranging for a translation of their home country driver's license, if necessary
- U.S. – a Social Security number is required to apply for a driver's license
- Some U.S. States have reciprocal agreements with one or more countries which allow transfer of driver's license without testing. In this case, your assignee may need a translation of their home country's driver's license or a letter from their home country's consulate office in the United States. ***Please check on your State's website.***

Renter's and Auto Insurance

- Provide contact information for insurance providers
- Make sure your Assignee understands appropriate insurance needs in your country, i.e., liability, personal property, etc.
- Renter's insurance is highly recommended/mandatory in the U.S. and in some cases, is included as a clause in the lease. ***IOR strongly recommends that all assignees obtain rental insurance.***



Whether DSC has supported home finding or not make yourself available to address the following concerns

- House maintenance, water shut off valve, furnace filter changes, carpet care, counter top and appliance care. Also include mentioning that in cold climates, furnace should be kept on when leaving for extended winter holidays. Provide the Assignee the [Winter Tips](#) document when living in a cold climate or [Hurricane Preparedness Tips](#) in those climates.
- Purchase/repair of appliances
- Availability of new, used and rental furniture
- Payment of bills, initiating utilities, and home/cell phone service

Provide thorough Community Orientation

- Have information about Newcomer's clubs, social organizations, i.e., American Women's Club, International Women's Club, etc.
- Give your Assignee information about the closest medical and emergency facility
- Describe the health care system in your area
- Discuss cultural interpretations, local customs, and social etiquette
- Offer to give names of places of worship
- Give your Assignee options for leisure activities and sports facilities
- Give information about adult education classes and local libraries
- Shopping
 - Give information about market/shop hours and holidays
 - Visit a local grocery store/market
 - Give information about local clothing shops and sizing
- Transportation
 - Parking procedures
 - Public transportation
- Visit the post office and review procedures



U.S. Only: Social Security Number

Policies and regulations regarding obtaining Social Security numbers change occasionally – and without notification to us. The following instructions are to be used as a guide – but know that you may need to be flexible if you get to the Social Security office and a procedure is different from what you/we have done in the past. Please notify your DPM of the change if this happens!

The national phone number for the Social Security Administration is 1-800-772-1213. The internet address for the Social Security Administration is www.ssa.gov.

Within a day or two of the assignee's arrival to the US with their WORK VISA they will be able to access and print their I-94 online (www.cbp.gov/I94). As soon as they can access and print this document, in MOST locations, it is possible to visit the SSA office to successfully apply for a SSN. **Check with your local office to become familiar with their practice**, as there are a handful of locations in the US where it is necessary to wait 10 business days after an Assignee's arrival to the US before applying for a SSN.

The Applicant will need to bring to the Social Security Administration office:

- Application [Form SS-5](#)
- The proper work visa (usually an E1, L1 or an L2)
- His/her passport
- A printed copy of their I-94 obtained from www.cbp.gov/I94 web site or the paper copy provided by the ports of entry from Canada and Mexico
- Another form of identification
- L2 visa holders (spouses of L1 holders) must have their original or a certified copy of the marriage license. They will receive their SSN when their spouse does, except if their marriage license is not in English. **If Spouse secures a translated certified marriage certificate from their home government agency prior to arrival, it may speed up the process of getting the SS card. Otherwise**, translations done by SS staff could delay the spouse's card for up to eight weeks.
- If an L2 or E2 visa holder intends to seek employment while living in the U.S., he/she MUST apply for an Employment Authorization Document (EAD). Please contact your DPM for instructions as our client companies have different requirements for this situation. (Generally, the company's HR Department or immigration counsel will be consulted for this.)



Social Security Procedures

Prior to going to Social Security Administration, **double check to be sure the facility is open and verify that the Assignee and spouse have their documentation with them.** SS observes all US Federal holidays.

Upon entering the office, take a number. If the application form has not been completed by the Assignee in advance of this visit, the Assignee can obtain the form in the lobby area of the facility and complete it while waiting for their number to be called. Take a stack of applications to have available for future assignees. For your convenience, you can download the form at [socialsecurity.gov](https://www.socialsecurity.gov).

Common Social Security Considerations

- The Social Security Number is assigned by a national computer and cannot be given at the initial visit to the SS office. The official Social Security Card will be mailed to the address given on the application – usually in about two-four weeks.
- It is better **not** to go to the Social Security offices the first few days of the month or the first few days after a holiday; the lines are much longer at those times.
- Children are NOT eligible to receive a Social Security number and children will get a Taxpayer Identification Number (ITIN). (We do not assist them with this – they apply for these numbers when they submit their income tax return.)



I-94 Background

The U.S. Customs and Border Protection has automated Form I-94 at air and sea ports of entry. The paper form will no longer be provided to a traveler upon arrival, except at the US border Ports of Entry from Canada and Mexico. The travelers will be provided with a CBP admission stamp reflecting the date of admission, class of admission, and traveler's admittance end date on their travel document/passport. If travelers need a copy of their I-94 (record of admission) for verification of alien registration, social security application, immigration status or employment authorization, it can be obtained at www.cbp.gov/I94. Travelers will also receive a flier upon arrival directing them to go to this website for their I-94.

The following information is now required to retrieve the I-94 document:

- Family /Last Name and First Name
- Birth Date
- Passport Number
- Country Name Issuing the Passport
- Date of Entry
- Class of Admission (L1, L2, E1, E2 etc.)

If the applicant's name is not in the data base they should keep checking the site for availability. The Assignee's name must match exactly on their passport, visa and I-94. If there is a discrepancy, check with the local Social Security office for guidance and notify your DPM of the issue for suggestions, time concerns and contacting the authorizer.



Closing a Program

Considerations impacting program closure

- If your program is four days or more, you may submit an interim invoice of 25% of program rate to your DPM for processing, after your first face-to-face meeting with the Assignee.
- Close your program within 10 days of program completion or you will not be paid.
- Payment is 30 days following DPM review of your program closure in IRMA.
- If your program time was less than or greater than originally authorized, confirm your actual hours with your Program Manager to determine final payment. The DPM will make the necessary adjustment in our proprietary system which migrates to IRMA with the update.

When you are ready to close out a program, log in to IRMA to view your “open programs,” click **View** next to the program you are ready to close. **Proceed with the following steps on each of the three tabs;**

Expenses Tab

The line items appearing under this tab include the services approved in your Program Confirmation, such as Area Tour, Home Finding, Settling In and School Search. When a Welcome Packet is authorized, this appears as a separate item for payment. Receipts are not required for Welcome Packets, but should be retained for business/tax purposes, as applicable.

No other expenses are covered in a standard program. If there is an exception, this must be preapproved by your Destination Program Manager. Receipts **may be required** for reimbursement. Scanned/e-mailed receipts are acceptable.

Supporting Documents

Upload your final document(s) by clicking “Choose file” and then select the “Type of document” in the drop down. Click “Save and Submit to IOR” for each document.

- Signed lease (if a home finding program)
- Signed Property Inventory (if a home finding program)
- Any client documents/reports (i.e., RMC required docs)
- Final IOR Status



Finish Program

Click “Start Survey” and proceed with completion of questions. Clarification on time is as follows:

- **Face-to-Face Time** includes actual time spent with the Assignee and telephone time directly with the Assignee. It also includes time spent acting on the Assignee’s behalf, such as setting up utilities, receiving rental furniture, completing the move-in inventory, etc.
- **Research Time** includes time spent researching for the Assignee, making phone calls, collecting materials, setting up appointments to view housing and schools, etc. 20- 25% of allotted hours is a reasonable expectation of research time but please check with your DPM if a RMC’s agreement is slightly different.

When ready, check box “I agree, my program is complete” and then click “Save and submit to IOR”.



Closing Email: Thank you

Be sure to email a thank you note to the Assignee. A template follows, but feel free to personalize it with material that is most relevant to your time spent together.

Dear (Assignee) (and Spouse),

We have now accomplished all authorized destination services that included: (Update the following list with relevant services you supported, see examples below)

- Area Orientation
- Social Security Application
- Home finding/ IOR Lease Checklist/ Inventory Checklist
- Bank Account
- Driver's license info and in person support at the DMV
- School Support

Please let me know if there are any remaining tasks with which I may provide assistance. Although I won't be contacting you regularly as your Destination Services Consultant, I'm only an email or phone call away if you have any concerns or questions as you continue adjusting to your new surroundings.

As my services are now complete, you may have the opportunity to provide feedback on the support you received from IOR. It is our hope that you feel *completely satisfied* in the areas I assisted with your move transition. If not, I would appreciate your suggestions on what I can do to improve your experience and those of future transferees.

It was a pleasure working with you, (Assignee's name). I wish you the best on your new assignment!

Best Regards,

Your name here

Destination Services Consultant

IOR Global Services

Phone: +1.555.555.5555

your email@youreemail.com

www.iorworld.com

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Assignee Program Evaluation

This form is sent electronically to the Assignee by the IOR DPM at the conclusion of the program, when allowed. In some cases, our clients have their own evaluation form and we will not send the IOR version. Once received by IOR, we will share the evaluation with you. **It is recommended that you strive to deliver 'Strongly Agree' services to the Assignee in each of the four areas outlined in the evaluation below.**



Destination Services - Assignee Evaluation

1. Evaluation

Thank you for taking the time to complete this evaluation of IOR Global Services - Destination Services. Your feedback is important to us and will help us continue to offer the highest quality services.

* 1. Name

* 2. Employer

* 3. City Where You Received Assistance

* 4. Field Consultant's First Name

* 5. Field Consultant's Last Name

* 6. Program Date (First Day of Program - Approximate)

MM/DD/YYYY

| | | | | |
|----------------------|----|----------------------|---|----------------------|
| MM | DD | YYYY | | |
| <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> |



Assignee Program Evaluation (Sample Page 2)

* 7. Please rate the following statements:

| | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree | N/A |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| My field consultant adequately explained the services I would receive. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| My field consultant was knowledgeable about the area. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| My field consultant was responsive to my needs. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overall, I was satisfied with the destination services provided by IOR. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

8. Would you recommend this program to others in your company?

- Yes
 No

9. Do you have any additional comments?



Departure Services Assignments

These programs are shorter and typically one day. They are focused on helping the Assignee when they have completed their job assignment and are returning to their home country or moving to another assignment. It is important to note that the tenant's obligations conclude on the lease termination date, not the date the home is vacated. Tenant obligations include: maintaining the interior and exterior premises and the payment of all charges (i.e. utilities and monthly rent). The IOR forms and documents used for departures will be included in your Program Confirmation email as attachments sent by your Program Manager. The full complement of departure documents can be found in the [Program Documents](#) section of the IOR Procedure Portal.

In general, your responsibilities will include:

- Upon receipt of the Program Confirmation, contact your Assignee within 24 hours. Include in your intro email (sample template included on the following page) the Leaving Host Country Departure Checklist and Leaving Host Country Departure Checklist Timeline. Review the Departure Status Report for a reminder of the tasks required with this support and enter dates when completed for submission to your DPM.
- Initial contact/call should cover notice of termination to landlord and request appointment to conduct a preliminary walk through (use Pre-Inspection Summary Report) for purpose of making recommendations to prepare the home for departure.
- If lease termination has not been received, then e-mail the IOR sample lease termination letter as a template, if needed, and confirm receipt by landlord of 'proper notice'.
- If the Diplomatic Clause is activated due to company transfer, have Assignee secure letter of transfer on employer letterhead, for landlord, as required.
- Review the **Departure Lease Checklist** from your DPM, if provided, and/or the lease, for applicable clauses.
- First appointment will include a preliminary walk through of the property with the Assignee to review the general condition, using move-in/inbound Property Inventory and the Pre-Inspection Summary Report, to document your findings. Discuss the differences between 'normal wear and tear' vs. damages, lease term requirements such as professional carpet cleaning and/or professional cleaning of the rental unit, and leaving rental in move in condition for next tenant. Take time to discuss Departure Checklist/Leaving Host Country for action items by Assignee.
- The preliminary walk through may create "to do list" of items for tenant. Identify damages for repair, maintenance issues and cleaning suggestions on the Pre-Inspection Summary Report. Include action items that list who is responsible for completion.



- Make recommendations if items need to be cleaned/repared prior to move-out and complete a Pre-Inspection Summary report, which you should send to your DPM.
- Coordinate date for final walk-through with Assignee and landlord.
- Attend the final walk through with Assignee and landlord.
- Perform move-out checklist with Assignee and landlord using the Property Inventory and note the condition of the property at delivery. Take photos of any damage or anything in question.
- Have landlord and Assignee both sign the Property Inventory document.
- Secure confirmation that Security Deposit will be returned to the right address or bank account.
- E-mail your DPM and Assignee a copy of the completed/signed Property Inventory with any photos taken at walk through.



Intro Email: First Contact with Assignee

Within **24 hours** of your introduction, you will email the Assignee using an [Email Template](#) with the key points as outlined in the template below. Use **Subject Line and Signature Block** as previously indicated in **IOR Professional Culture** section.

Please personalize by modifying the templates below based on the Assignee's info, the details of the program, your usual email font and the tasks you have been hired to do.

Dear (Assignee name) (and spouse),

My name is (name) and I will be serving as your IOR Destination Services Consultant for your upcoming departure from (host location). I would like to schedule a phone call to discuss the timeline for your move, confirm when/if written notice of your lease termination has been provided to the Landlord/Property Manager, identify potential repairs needed and schedule house cleaning. If time permits, I would like to meet with you briefly at your rental property, so we can agree on what steps you need to take to get the rental ready for the final walk through with key handover to the Landlord. Would next (day of the week) at (time) be a convenient time for us to meet? If this is not convenient, please provide a time that would better suit your schedule and I will try to accommodate.

I will help you prepare your rental for the final inspection to facilitate the return of your Security Deposit, conduct a move out property inventory with you and the landlord present, assist with finalizing all necessary tasks such as notifying the utility companies of your move date, forwarding mail, obtaining school records/transcripts (if there are school age children), cancelling renter's insurance and identifying best time to close your local bank account.

Attached you will find a helpful resource, 'Leaving Host Country Departure Checklist'. I will review this checklist with you at our initial meeting to start your departure process.

Upon completion of my services, you may receive an evaluation of my services. I hope you feel that the services I provided merit the highest scores. If not, I would appreciate your feedback and any suggestions on what I can do to improve your experience and the experience of future transferees.

I look forward to hearing from you and am available for any immediate questions or concerns you may have.

Best Regards,

Your name here

Destination Services Consultant

IOR Global Services

Phone: +1.555.555.5555

your_email@youreemail.com

www.iorworld.com

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Schedule the final walkthrough with landlord or their representative, yourself and the Assignee, if possible. It is always preferred that the Assignee be present and that the property be empty of their possessions AND cleaned/repaired as discussed during the initial walkthrough.

Remind the Assignee to gather valuables and documents they will want to carry with them – these should be put in a safe place where the movers will not pack them! The Assignee will also need to gather keys, garage door openers, and any other items which are the landlord’s property in a place where movers will not pack them. Remind them also to check every nook and cranny, closet and storage area of the home before they let the movers leave!!

During the final walk through, use the Property Inventory and complete the columns for the “Ending Condition” of the property. **Please be detailed and specific in this document as it may become very important if the landlord and the tenant disagree about any damages or wear and tear to the property.** Your job is to advocate for the tenant and ensure that the landlord is not taking advantage of them or retaining funds from the security deposit unnecessarily. Photos are often helpful to document the property condition. Final details:

- Arrange and monitor the return of the security deposit.
- Be certain that the Assignee returns keys and garage door openers to landlord as recorded on the Commencement Inventory or in the lease itself.
- Make sure you have a forwarding address and new phone and email contact info from the Assignee before they depart.
- Provide banking details or mailing address for return of deposit. (The deposit is typically returned to the Assignee, the relocation company or the employer per policy – your DPM can direct you).



Closing the Departure Program with the Assignee

Be sure to email a thank you note to the Assignee. A template follows, but feel free to personalize it with material that is most relevant to your time spent together.

Dear (Assignee) (and Spouse),

I wanted to send a follow-up communication as we have now accomplished all authorized Departure Services that included: (Update the following list with relevant services you supported, see examples below)

- Notice to the Landlord
- Pre-Inspection of your property
- Recommendations/To Do's to prepare rental for Handover to Landlord
- Completed Inventory Checklist

Please let me know if there are any additional tasks with which I may assist. Although I won't be contacting you regularly as your Destination Services Consultant, I'm only an email or phone call away if you have any concerns or questions as you continue adjusting to your new surroundings.

As my services are now complete, you may have the opportunity to provide feedback on the support you received from IOR. It is our hope that you feel *completely satisfied* in the areas I assisted with your move transition. If not, I would appreciate your suggestions on what I can do to improve your experience and those of future transferees.

It was a pleasure working with you, (Assignee's name). I wish you all the best and hope that your time in (new city) has been a rewarding experience.

Best Regards,

Your name here

Destination Services Consultant

IOR Global Services

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Proprietary Information

Please see the Destination Services Independent Contractor agreement for additional guidelines regarding your relationship responsibilities to IOR.

Privacy Policy and Protocol

IOR is retained by companies to provide a critical service to their employees. As an independent contractor working for IOR to serve these clients, it is imperative that you abide by IOR's privacy policy and hold all information in its strictest confidence. Under no circumstances may you share personally identifiable information with anyone other than those necessary to execute your responsibilities as a Destination Services Consultant. We must keep in mind that the companies are our clients, and we need to protect their best interests. Please maintain complete confidentiality regarding the information you receive about the assignee, including but not limited to; individual salaries, benefits, home or furniture rental allowances, school placement, etc. A complete list will be provided upon request. This information should NOT be shared with anyone outside IOR and should NEVER be shared to another assignee. We request that you do not save any client or IOR related documents on your personal devices following program completion; delete them immediately after you have closed a program. Please notify IOR immediately, if your email is hacked or you have your device stolen that contains IOR client sensitive information. Additional details can be found at <https://www.iorworld.com/ior-privacy-policy/>

Furthermore, we have in our client base companies which are competitors within the industry. In working with families or talking to our company contacts, all information must be held in strict confidence, particularly from company to company. Please also know that some companies do not want information shared among their own assignees.

IOR provides a buffer between client company personnel and the employee in the transfer and settling-in process. Because of our close working relationship with families, we are often privy to medical, marital, job or other personal problems. This information must not be shared with the Assignee's employer. Destination Service Consultants, however, should seek the advice of the IOR Destination Program Manager when a family problem needs professional attention.

Confidentiality: IOR's Policy

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