

# INTERNATIONAL RESETTLEMENT SERVICES IMPLEMENTATION GUIDE

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 LEADING REAL ESTATE  
COMPANIES *of* THE WORLD™

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## Chapter 1 – Introduction to International Resettlement Services

### What are International Resettlement Services?

International Resettlement Services are services to assist foreign nationals (people coming into the United States from other countries) get settled in a new living environment as quickly as possible by offering local destination assistance including:

- Home finding
- Utility connections
- Home furnishings
- School selections
- Language assistance resources
- Area orientations including where to shop and how to purchase items
- Welcome to the United States and to the area overviews
- Logistics Assistance
  - Obtaining crucial documentation such as social security cards and driver's licenses
  - Establishing banking and credit relationships

The purpose of this manual is to help Leading Real Estate Companies of the World® (LeadingRE) members design and implement services that can be marketed to global corporations. It is limited in scope in that it does not include extensive cross-cultural training or prepare you to offer these services outside of your market. You may decide to go to that next level, and many LeadingRE members are successfully partnering with other LeadingRE members to assist clients who have foreign nationals moving across the country.

Resettlement Assistance Services should provide the following to corporate clients for their employees:

- Assess the needs of the employee and family by learning about their particular circumstances, concerns about the move, and issues which affect either their decision to relocate or their success in adapting after they accept the transfer, in order to tailor a program which addresses those individual requirements.
- Assist the employee and family in understanding what it will be like to live and work in the United States and, specifically, the local metropolitan area, by both explaining and demonstrating local practices and lifestyles.
- Assist the employee and family in locating suitable housing based on their needs and preferences, whether it be renting an apartment or single-family home or purchasing a home, and helping them buy or rent wisely.
- Accompany the employee and/or spouse to obtain Social Security cards and driver's licenses, visit schools, establish banking relationships, and handle other logistics of the resettlement process.

- Be available as a continuing resource to the entire family to answer questions that arise about local customs, how to accomplish certain tasks, how and where to buy certain commodities, etc. throughout their assignment period.

### **Why are International Resettlement Services Important?**

As our global economy grows, corporations are experiencing an increased need to bring foreign nationals into the United States on temporary assignments for periods of two to three years. In addition to increased international relocations due to the expansion of United States based companies into other global markets, there is often a need to hire technological talent from other countries due to a shortage of qualified workers in technical fields. Industry research has shown that the cost of one international assignment can be as much as one million dollars. Corporations need service providers who can help protect this investment by providing assistance that increases the chance for a successful outcome.

Human Resource professionals recognize the tremendous investment they have made in the transferring employee and know that a high number of these assignments fail due to maladjustments on the part of the employee or family. But, they are busy pursuing the technical aspects such as visas, immigration documentation and job specific needs for the employee along with their other duties. They often do not have time to adequately support the lifestyle needs of the entire family. This is where the opportunity arises – you can perform services that help attract and retain their valuable investment and make their jobs easier while making them look good too. And, you can do it for a fee that in the large scheme of an international relocation is relatively low, while building in a satisfactory profit margin for your relocation division.

Leading Real Estate Companies of the World® members already excel at providing quality, professional relocation services for domestic transferees. With a little more planning, research and resources, you can also offer the same level of service to international transferees.

### **What are the Differences between Domestic and International Relocation Resettlement Services?**

International employees generally need more hands-on assistance than typical domestic transferees, particularly if they have not traveled extensively or lived abroad. Human resource managers may not be able to devote the attention needed due to other responsibilities. Often, international employees feel that their questions and concerns are elementary, or unusual, and they may hesitate to ask a employer representative because they do not want to appear inexperienced or foolish, or are reluctant to ask questions of a more personal nature. As a professional, outside party, LeadingRE members can provide focused attention, sensitivity and confidentiality to increase the employee's comfort level and enable him to overcome challenges which might not be addressed otherwise bringing serious threats to the success of the assignment.

Providing comprehensive and caring resettlement assistance helps ensure the employee is able to focus on the job and not the difficulty of the family's assimilation into the United States lifestyle. Your services should be designed to provide full integration into your community, not just help the foreign national locate suitable housing. Your staff should offer emotional support AND practical hands-on logistical support to the transferee and family.

## **Important Things to Know**

In most cases, spouses will not be permitted to work in the United States during the term of the assignment and this can create tremendous stress, especially if the spouse has a professional career that has to be put on hold or if the loss of income impacts the family's lifestyle. While you cannot provide solutions to financial concerns, you can help by providing information on educational and volunteer opportunities for the spouse to remain active and involved in the new community. Also, some corporations provide spousal assistance programs which have benefits such as paid tuition for continuing education in the partner's career field during the assignment or other such support programs.

Usually the corporation's legal department or Human Resource Department arranges for visas and other related documents and many provide specialized tax counseling assistance to address tax issues related to international assignments.

Language is not necessarily the obstacle you might imagine. Most U.S. bound foreign national employees speak some English, and even if their spouses do not, they may prefer to interpret for the spouse rather than have another individual translate for them. Still, you should investigate language translation services to make available should the need arise.

Pets – Foreign nationals need to check in advance to learn whether pets can be brought into the United States. If pets are permitted, they can be subject to a lengthy (six months or longer) quarantine period to ensure they are disease free. Depending on the type of pet, recent health certificates from a veterinarian will likely be required to waive the quarantine period.

### **Definitions:**

Foreign National or Inpatriate – Citizen of a foreign country relocating to the U.S. under sponsorship of a U.S. employer or firm. This manual addresses delivering services to these employees.

Other international transferee terms you may hear:

Expatriate - Employee leaving the U.S. (or another foreign country) for assignment in another foreign country.

Repatriate – Employee returning to the U.S. (or another foreign country) after completion of a foreign assignment.

## Chapter 2 – Getting Started

This chapter contains a wealth of information that you can use in preparing your services, presentations and materials. You should prepare a resource booklet or International Newcomer Kit to send to the employee in advance of their visit, or provide a supply to the corporate client for delivery with other information about their assignment. You do not have to have everything listed to begin service delivery. There are some components that are absolutely necessary, and others are intended to help you design the best program possible.

### **Basic first steps include:**

- Purchasing some cross-cultural presentation materials such as “Living in the United States” video (See Resources in Chapter 5).
- Designing a Living in “(your market)” area presentation including oral presentation and visuals to demonstrate housing in your market, industries, brief history, national, state and local government, schools, recreation, points of interest, etc., You may find that there is a video or CD presentation available from your local chamber of commerce, tourism bureau or economic development department that would be appropriate for this presentation. However, be sure to augment pre-packaged presentations to show typical rentals or homes for sale. Be sure to orient the transferee and family using maps of the United States, your state, and city.
- Putting together a great Welcome package containing information included later in this chapter.
- Designing forms such as a Needs Assessment or other charts or handouts.
- Developing a resource library of basic materials such as Social Security Applications, Driver’s License Study Guides, etc.
- Planning and mapping an orientation tour.
- Determining pricing for your services.
- Developing marketing materials.
- Preparing proposals.

This list may seem overwhelming, but once you start reviewing your resources, you will see that you already have many of the things you need and that most of the work involves “re-packaging” existing materials for international audiences. Plus, many of the items are found in this manual!

## **Actions, Materials and Resources to Consider**

### Language Skills:

Survey sales and administrative staff members to learn if anyone speaks other languages or has lived abroad. This can help in your marketing efforts and in determining what associates may be best suited to accept international assignments. It is not mandatory that you have language capabilities on staff to offer these services but it can be beneficial.

Research availability and costs for translators. Again, local colleges may offer free translators, as do ethnic groups within the community, some Realtor associations and other sources. If you do need to engage a paid interpreter, make sure the employer understands there will be an additional fee for these services. Some experts within the industry predict that full translation services will become available on the Internet in the not too distant future. Some limited services are available for free already. (See Resources in Chapter 5)

Identify Partners you can work with to deliver many of the services, including:

- Furniture Leasing Companies
- Temporary Housing Companies
- Global Moving Companies
- Mortgage Companies
- Automobile Dealers
- Travel Agencies
- Banks/Credit Card Companies
- International Departments at local colleges
- International Attorneys
- Language Assistance – translators, tutors
- Other Professional Referrals – Doctors, Veterinarians etc.,
- Carpenters, Lawn Care, Electricians, etc.
- Nannies and Household Help Providers

Rental Assistance – Professional rental assistance is mandatory. If you do not currently offer rental assistance to corporate clients, you may need to partner with a local rental company who you are confident will deliver outstanding service, and outsource this portion while strictly monitoring and coordinating the assistance. Meet with the company representative ahead of time to clearly define expectations and responsibilities to ensure thoroughness and avoid duplication of efforts. Determine what compensation the company will require and build it into your overall fee structure.



## Preparing the International Welcome Package and Area Presentation

The following are topics you should address in your presentation script and consider including in your International Welcome Package or booklet:

- **Emergency Information** - (911 for police, ambulance and fire). In many parts of the country, if a caller cannot speak English, they can identify a language and emergency staff will conference in someone fluent in the language. You should verify if this source is available in your market. Provide non-emergency numbers as well. If preparing a booklet, leave space to write in other numbers, hospital phone and address, doctor, landlord contact numbers, etc.
- **Social Security Card:**
  - Supply information about how to apply, location, telephone number, hours of operation, process. Include this information in the booklet but you should accompany the employee to obtain the card.
  - Call ahead of time to determine if the office will accept appointments and if they can provide the social security number once issued by phone so the employee does not have to wait to receive it in the mail and ask about the time frames for receiving the number verbally and for receiving the card by mail.

Note: Only the employee can receive a social security number. Spouses and children need to get a Tax Identification Number (see below).

The process includes completing “Social Security Administration Application for a Social Security Card” form. Documents needed include: passport, visa (including all documents received from Immigration and Naturalization Service (INS) such as white I-94 card and pink 1099 form or J-1 visa. Obtain copies of this form to keep in inventory. Verify with your corporate contact in advance that they have assisted the employee with obtaining all the documentation they need and make sure they are not looking for you to assist with this highly specialized and complicated area. The employee will be given a receipt and then the card is sent in the mail in a few weeks. The transferee may have to use his employer’s address since the application process should be completed before any home finding efforts.

- **Tax ID Numbers** – Obtained from Internal Revenue Service Office by completing “Application for IRS Individual Taxpayer Identification Number” form for each family member other than employee. They will need to take passport, all visa and INS documentation same as above, name and social security number of person on whom they are dependent. Include IRS office locations, phone and hours of operation.
- **Driver’s License:**
  - Keep a supply of your states Driver’s License Manual.
  - In your package provide a list of Department of Motor Vehicles (DMV) locations, telephone numbers and hours of operation.

- Offer to accompany employee to obtain licenses. Two forms of identification will be needed (check with your state DMV to confirm exactly what is needed). Generally, the primary document must be one of the following: passport with admission stamp/1-94 Form, 1-94 Form without passport but containing photograph, Employment Authorization Card (from INS) and secondary documents can be one of the following: International Driver's License, Driver's License from home country, credit card, marriage license, corporate picture ID card. They do not have to surrender their international or home country driver's license and, if asked to do so, they should request a supervisor.
- List requirements for testing: vision, multiple choice written exam, on-road driving test, etc. Include a sample test if one is available from the DMV. Some facilities allow language translation for people taking the test, so if this may be needed, be sure to ask and make arrangements in advance.
- List costs and what forms of payment are acceptable.
- Provide information about requirements to report change of address and how to do it in your state.
- **Automobile Title and Registration** – Provide information on where to register, documentation needed, and costs. Provide information for changing address for car registration as well.
- **Automobile Insurance** – If required in your state, include this information and provide names of reputable insurance carriers and contact information.
- **Automobile** – Develop relationships and have materials available from local dealers about purchase and lease programs. Ask employee ahead of time about their preferences. Most inpatriates will not have their current automobiles shipped to the U.S. due to prohibitive costs.
- **Maps** – Have ample supply available and indicate location of employer, your office, hotel, etc., prior to sending to the employee
- **Schools:**
  - Include information on public schools and state agencies – locations, contact information, etc. Provide basic information on school system such as grades, age requirements, school year calendar, hours, bus transportation, curriculum (especially any honors or accelerated programs), graduation requirements, transcripts they should take with them when enrolling (again, you may want to accompany them as part of your service), any special courses they have for English as a second language, enrollment requirements such as proof of residency, birth certificate, passport, immunization records and the immunizations your state health agency mandates. (Check with your school district and state)

- Provide contact information for private school options.

Many foreign nationals will be coming from countries with more accelerated curriculum than what is offered in the United States. They may need your assistance in locating schools or other resources for additional learning opportunities outside of the public school system so that their children are not negatively impacted upon returning to schools in their home countries.

- Provide contact and resources for additional language training available from tutors, community colleges or other schools. Some communities offer free “English as a Second Language” classes at some community centers or public libraries. If your market does not have these resources, you will need to research private providers and what the costs are for these services.
- **Childcare** – Provide lists and contact information for daycare centers or other services such as nannies.
- **Elder Care** – Provide lists and contact information for local senior groups and facilities.
- **Volunteer Organizations** – Since most trailing partners will not be allowed to work in the U.S., provide a list of active organizations in your community that will allow the partner to contribute their time and talents should they so desire.
- **Health Care:**
  - Review basic information about types of insurance programs (HMO, PPO, etc.) Advise them to check with their employers regarding availability as a benefit and for specifics about coverage.
  - List Hospitals, Emergency Care, and Urgent Care Facilities and be prepared to explain the difference during counseling sessions.
  - Pharmacies and Prescription Drugs – Briefly explain medicine availability (prescription and non-prescription) and provide names of pharmacies.
- **Churches, Mosques and Synagogues** – Provide locations and contact information.
- **Housing:**
  - Give basic information regarding current market conditions (ease or difficulty of finding suitable housing) and availability and cost of housing (available types and costs of housing in various communities in your market).
  - Local Rental Practices - Provide information on agent fees if applicable, standard lease terms and other general issues such as security deposits, escape clauses, furnished vs. unfurnished, etc.

- Homeowner or Renter’s Insurance – Explain the differences and what each covers. Offer assistance in securing appropriate insurance for their needs.
- Types of Housing:
  - ✓ Apartments for Rent – Studio (small with living area and bedroom combined), one, two or three bedroom with 1 or more bathrooms, kitchen, and living room are basic choices.
  - ✓ Townhouse/Condominiums for Rent from Owners or Purchase – one or two story homes in communities with layouts similar to apartments. May have more restrictive rules or covenants mandated through a Homeowner’s Association.
  - ✓ Single Family Homes For Rent or Purchase – Generally detached dwellings on lots of land varying in size offering more living space and rooms such as family rooms, dining rooms, etc., and garages. (Note: you should address rental availability limitations if applicable in your market)
  - ✓ Corporate Housing for Rent – Generally fully furnished apartment or home including furniture, utilities, appliances, cookware, linens, television and phone.
- If the employee decides to rent a home, explain the need to enter a contract with the leasing company or owner called a lease. Since he/she will not have a credit history in the U.S., landlords may require a letter from the employer and it should be brought for the final home finding visit. Advise him/her to be sure that all of the provisions are understood and check with the employer for instruction regarding any language required regarding lease termination financial penalty limits. Train your international counselors to insert a clause into leases for international employees similar to:
 

“Transfer/Termination of Tenant’s Employment – Landlord understands that Tenant is in the U.S. on a temporary assignment and work visa. In the event Tenant is transferred by his or her employer, Tenant may terminate this lease upon 90 days written notice without penalty of any kind.”
- Prepare them regarding the need to pay a security deposit that is refundable after the property is vacated if there has been no damage during tenancy. (Add other deposits or fees required in broker’s market).
- Caution that many rental properties may not allow pets, and if they do, will more than likely have weight or type limitations.
- Rental Costs: Include price ranges for properties in broker’s market(s).

Note: If the employee expresses an interest in purchasing a home, advise him/her to check with the employer first. Purchasing is generally not recommended unless an assignment will last for four or more years but employers have varying policies regarding home purchase.

- **Utilities and Appliances:**

- In the U.S. the standard electrical currency is for 115 volts, 60 Hertz, Three Wire, and Single Phase. It is possible to purchase converters at appliance stores that will enable use of some existing appliances and equipment. (List names of some appliance stores). See Resources section for a company that specializes in assisting international transferees with appliance conversion questions.
- List and give contact information as well as deposit or connection fee requirements and other pertinent information. Arrange for utilities hook-ups if possible.
  - ✓ Electrical Service Connection
  - ✓ Gas Service Connection
  - ✓ Water and Sewer Connection
  - ✓ Trash Service
  - ✓ Cable Service
  - ✓ Telephone Service Connection
- **Telephone:**
  - Provide overview on differences between local and long distance calls, how to dial, service providers and contact information for each.
  - Arrange for telephone connection if appropriate.
  - Review Telephone Directories – white pages, yellow and blue pages.
  - Provide cell phone service information if needed.
- **Cable TV and Internet Access Providers** – Provide contact information.
- **Furniture and Appliance Leasing:**
  - Provide list of companies in your market who lease furniture and assist with obtaining furniture and furnishings the employee needs.
  - Depending on the length of the assignment, it may be in the employee’s best interest to purchase some items as opposed to leasing.
  - Determine up front what items they will be shipping and the estimated time of arrival in the U.S. and if they will have furnished corporate housing available in the interim. Many employees may not need to lease anything if these benefits are sufficient.
- **Shopping:**
  - Provide overview on shopping options and names, products and addresses of businesses in the area:

- ✓ Malls – Retail and Outlet
  - ✓ Discount Stores – Walmart, Target, K-Mart, etc.
  - ✓ Electronics and Appliances
  - ✓ Furniture
  - ✓ Department Stores
  - ✓ Clothing
  - ✓ Home Furnishings
  - ✓ Etc.
- Grocery Stores, Specialty Food Markets and Convenience Stores - Prepare the family for the wide selections available which comes as a shock to people from many other countries. Also, explain the difference in pricing between grocery stores and convenience stores.
  - Ethnic Food Stores – Provide list if appropriate and include visit during orientation tours.
  - Specialty Food Stores such as bakeries, butchers, etc.
- **Restaurants** – List a number of restaurants by type of foods and dining styles (cafeteria, fast food, etc.). Be sure to include ethnic restaurants if available.
  - **International Clubs, Social and Cultural Organizations** – Provide information on ethnic and non-ethnic, support groups and associations.
  - **Consulates and Embassies** - Provide local or national contact numbers for the nationalities you may be working with most regularly. See Resource Section for how to find this contact information.
  - **Pets:**
    - There may be quarantine periods required for some pets. Generally, they will need to have a current health certificate and current rabies vaccination. Advise employees to check with their employer for definitive resources for answers.
    - Provide contacts for veterinarians, animal hospitals and clinics.
    - Provide information on license requirements and leash laws for dogs.

- **Plants** - Recommend that they do not import plants due to problems with U.S. Customs regulations.
- **Weather Details:**
  - Include average temperatures for each season and what type of clothing will be needed for each. See temperature conversion chart in Chapter 5.
  - If you are located in areas with extreme heat or severe cold and hazardous conditions, include information for normal precautions when traveling.
  - Give information for the weather service, weather TV channels and radio stations, or other ways to obtain forecasts such as weather websites.
- **Parks and Recreation:**
  - Provide locations and contact numbers for public parks in the area along with brief descriptions of what they offer.
  - Community recreation facilities and gyms
  - Movie theaters
  - Live theater venues
  - Libraries
  - Nightclubs
  - Museums
  - Amusement Parks
  - Local Festivals
  - Sports Facilities, etc.
- **Newspapers** – List and assist with obtaining subscription to local paper(s). Make them aware of national newspapers and publications and, if available locally, vendors for international publications.
- **Personal Safety:**
  - Advise the employee on personal safety precautions such as locking doors and windows, putting valuables inside of the trunk and locking the car, being careful at ATM machines, carrying money, unsafe areas, especially at night, etc.
  - If applicable, caution about vagrants and panhandlers and advise them on how to avoid fraud during telephone solicitations if asked for credit card information.
- **Media** - Provide information on local radio and television stations, national network affiliates, especially for special programming and foreign language broadcasts.
- **Helpful Internet Sites** – National and local websites such as government agencies, chambers of commerce, tourism offices, map locators, colleges and universities, public schools, etc.

- **Tipping in the U.S.** - Share customary tipping practices such as tipping taxi drivers, bartenders, waiters, waitresses, doormen, barbers, hairstylists, manicurists, valet parking services, porters, baggage porters at airports and hotels. Advise that an average tip is 15% of the total bill at a restaurant, 20% for above average service.

- **The Money System:**

- Currency –

One Dollar (\$1)	=	100 cents (also called pennies)
One Quarter	=	25 cents
One Dime	=	10 cents
One Nickel	=	5 cents
One Penny	=	1 cent

- The United States bases its cash currency on the decimal system.
- The size of a coin does not indicate value – for instance a nickel (5 cents) is larger than a dime (10 cents).
- Generally coins are worth less than paper bills – One Dollar, Five Dollar, Ten Dollar, Twenty Dollar, Fifty Dollar, One Hundred Dollar and higher.
- Most transactions are completed utilizing \$50 bills or lower and some businesses will only take \$20 or lower. Some bus services or other transportation providers, vending machines, pay phones, etc., require exact change.

- **Taxes:**

- Most people pay two types of income taxes – state and federal. If your market area has additional local income taxes review these as well. Most foreign nationals will be professionally briefed on income taxes by the employer’s accountants.
- If the employee plans to purchase a home, explain any property related taxes or assessments.
- Review other local taxes including personal property, utilities, etc.

- **Banks and Checking:**

- Assist with setting up personal banking for the foreign national.
- Generally, large banks will be more likely to provide specialized international services and you should interview banks in advance to find out what services they offer and what documentation they require in order to issue a credit card or open personal checking accounts.



- Also, check with the employer to see if they have banking relationships that would make the process easier for the employee.
  - Explain about FDIC (Federal Deposit Insurance Corporation) bank deposit safety guarantees up to \$100,000 per customer in each bank and encourage transferees to only work with banks who offer it.
  - Checking accounts and savings accounts come with a variety of options, interest rates and fees and the bank should be asked to explain these options for the transferee, but basic checking and savings will suffice in most instances.
  - Explain that most monthly bills are paid by check and show them how to write a check if needed.
  - Explain ATM (Automated Teller Machine) and Debit cards, locations and how they work to obtain cash and for purchases with automatic deductions from the checking account. Also discuss automated deposits and debit options if applicable.
  - Encourage the employee to open bank accounts in the United States immediately to facilitate initial rental deposits/payments. Most employees will maintain an account in their home country during the assignment and the home bank may have a representative in the United States who could assist with references and account registration.
  - There are strict regulations on bringing currency across national borders, some which limit the amount of cash unless a special filing is made with customs.
  - Credit Union accounts may be an option offered by some corporations and transferees should be encouraged to review those options as well.
- **Credit Cards:**
    - Explain that in the U.S., most stores, restaurants, and banks accept credit cards (but a few do not due to the fees charged to the store for using them and in these instances cash or a check is needed).
    - List well-known cards – Visa, MasterCard, American Express, Discover.
    - Check with the banks you may be dealing with on their requirements in obtaining a credit card issued through them (credit verification, or need to obtain secured credit card by depositing funds as guarantee while credit is established) and explain process and fees, monthly billing and interest charges to transferee and encourage them to obtain a credit card for convenience.
  - **Currency Exchange** - Investigate and have contact information available for currency exchange services.

- **Postal Rates and Services:**

- Explain that the primary mail delivery system in the U.S. is the U.S Postal Service and that every community has Post Offices with specific zip code location identifications.
- Provide locations and phone numbers, hours of operation.
- Explain stamps and postal rates determined by weight for letters and packages.
- Show how to properly address letters and packages for delivery if needed.
- List other package delivery service companies in your market such as Mail Boxes, Etc., UPS, Federal Express and describe how they differ from postal service.

- **Weights and Measures** - While use of the metric system is increasing in the U.S., we still primarily use our own system of weights and measures. You may need to review basics on the U.S. system. (See Conversion Charts in Chapter 5)

- **Transportation:**

- Provide maps and explain the road systems in your area: Interstates, Expressways, primary, secondary, toll roads, etc.
- Airport and train station locations and phone numbers, airlines and contact information.
- Provide information on Public Transportation including:
  - ✓ Cabs or Taxis (Fare Rates)
  - ✓ Bus Service (Stops, Routes and Rates)
  - ✓ Commuter Trains (Station locations, destinations, rates, etc)
  - ✓ Other
- Bike Paths
- Pedestrian Rules
- Amtrak passenger train information if applicable.

- **Gasoline:**

- Explain that most gas stations in the U.S. are self-service, which means that there are no attendants to serve people and everyone pumps their own gas.
- Describe how to pump gas and make payment if necessary.
- Make sure to include gas station locations near their employer and probable area for housing as part of the orientation tour.

- **Laws and Practices:** Share basics on traffic laws including penalties regarding drinking while driving, smoking regulations, pedestrian road crossings, etc.
- **U.S. Holidays:** Explain that on primary holidays, all government offices, post offices and banks, most employers, and many businesses and stores are closed. There is no mail delivery and schools are closed. See Holiday List and Description in Chapter 5.

## Chapter 3 – Delivering Services

### How to Conduct the Needs Assessment

A dedicated relocation staff member should coordinate all services and continually monitor the quality of service delivery and the comfort level of the employee and spouse. This person should be responsible for contacting the employee by phone and providing an overview of the services.

A basic needs assessment should be performed in order to customize a plan for that particular employee. Make sure to remind employees about important documents to bring with them – Visas and immigrations forms, school transcripts, credit letter from their bank, driver's license, passport or birth certificate, etc. (See Checklist in Chapter 5).

If they do intend to buy a home, tell them to bring: employment letter, work visa, documentation for 12 month history of previous mortgage or rental payments, 3 months of bank, checking & savings statements showing address, type of account and balances, income verification (4 payment check stubs and list of current credit accounts and loans including account numbers, monthly payments amounts and balances).

Other questions to ask or topics to cover during the needs assessment include:

- Explain your role in helping the family get settled in the new community
- Family profile and needs analysis, including language capabilities
- Travel schedule, arrival (offer airport reception) and start date with employer in U.S.
- Hotel accommodations for the first visit
- Need for temporary housing
- Need for car rental during visit and after arrival
- School information
- Preferred communication methods during time prior to visit (phone, fax, e-mail)
- Medical needs
- Familiarity with the U.S. destination, if any.
- Determine if their visit is a “look see” visit or their final travel to U.S. destination. If this is their final arrival trip, review how much luggage or size of other items they may be bringing with them. You might need a larger vehicle for airport pick-up.

There is a sample Needs Assessment form in the Appendix.

It's a good idea to make this first contact a conference call including the appropriate employer representative to help clarify any issues, answer questions, ensure correct time frames and avoid scheduling conflicts with employer needs. This call can be instrumental in helping you determine what legwork your staff can do in advance to make the visit more productive. Make sure to research time differences with the home country so you do not try to make contact at an inappropriate time.

Send a Welcome Kit within 24 hours via priority mail of some kind.

For delivering all other services, only highly qualified, specially trained individuals should be involved in working with international transferees. Many brokers use only salaried relocation staff to deliver all of the resettlement services while others have been successful in utilizing a highly select and specially trained pool of sales associates.

### **Homework:**

Do some research in advance on the transferee's home country including history, current affairs, culture, etc. With the tremendous amount of information available over the internet, you can do this in a relatively short amount of time and it can make a major difference in your effectiveness. Share the research with whoever will be providing the majority of the service or encourage them to do additional research.

### **More Needs Assessment:**

Once the employee arrives in the United States, ideally in a pre-move visit, your international team member should meet with the employee and spouse at their hotel or office to further determine their familiarity with American culture and language, their personal or family situation and their principal concerns about the relocation.

Determine what type of housing they prefer, what furnishings they will ship in order to plan assistance in obtaining what they may need in the U.S., whether they will need to purchase or lease an automobile, if they have an international driver's license, etc. Find out if they will need temporary living (corporate housing) accommodations upon arrival and be prepared to coordinate it on the employer's behalf until longer-term housing is obtained.

### **U.S. and Local Orientation Presentation:**

You should prepare and deliver a presentation about living and working in the United States successfully as well as a slide, CD, or video presentation on virtually all aspects of life in the local area...transportation, laws and government structure, education, housing, recreation and shopping, and more. (See the Resources section of this manual for information on obtaining professional videos and other materials specifically for in-bound U.S. transferees that you may wish to purchase) Adapt the presentation for the employee or spouse's level of familiarity with the U.S and the local area but generally your presentation should last between one to three hours.

During this presentation, provide other resources you have available, Driver's License Study Guide and other literature to assist them with the move. Review the services you will provide and the itinerary for this part of your service program. It's crucial for them to understand why the social security card application needs to be first on the list even though it's probably near the bottom of their priority list, because it will be needed to proceed with obtaining credit, finding a home, etc.

Recommend that they take notes throughout the presentations, tours and visits to help in absorbing the tremendous amount of information they will be receiving during their visit and then they can review them at night and ask questions the next day.

## **Orientation Tour:**

Depending on the time available, where the family is likely to be living/working, their special interests and whether the tour is part of a pre-move visit or following the employee's arrival to begin the assignment, the tour should include:

- Residential areas
- Shopping, commercial districts, inside a grocery store for home country selection/price comparisons
- Schools and day care facilities, often including visits inside
- Local landmarks, amenities, and recreational facilities
- Transportation venues
- Sample housing based on their needs and budget
- Other stops requested by the transferee or spouse

Throughout the tour, the associate should encourage the transferee and spouse to ask questions and further explain lifestyle issues touched upon during the orientation presentation. Show them where to shop for needed items at good prices, a good place for a haircut, the post office, etc.

## **Housing Assistance:**

Your associate should provide hands-on education and professional assistance in the home search process, whether the employee chooses to rent or purchase a home. Make sure your associate encourages the employee to follow the employer's recommendations relative to renting or purchasing a home.

Provide objective advocacy for the transferees and advise them on the options most likely to offer a satisfying home environment during the U.S. assignment. The associate or relocation staff member should review all documents and help employees negotiate leases or purchase agreements, explain the process, obtain the best price and make it as simple as possible. As mentioned in Chapter 2, make sure to include any employer required language for lease termination upon future relocation, and that the employee clearly understands all terms in the lease, including security and other deposits. It's a good idea to find a leasing company that will work well with you on an ongoing basis to serve these clients if you do not have one affiliated with your brokerage company.

When international transferees decide to purchase homes, fully educate them on the subjects of current property values and what may be expected within the next few years, what closing costs are for a seller so they understand there will be substantial costs upon selling a home (including real estate commissions), thorough inspections, construction types, etc. Often homes in the United States may not be of the same quality of construction that foreign nationals are used to in their home country. The level of representation needed is higher when dealing with international transferees and your associates must understand that they should seek out potential problems relating to future values and property condition and make every effort to educate the transferee.

## **Logistics Assistance:**

The associate should escort the employee and spouse on visits to the driver's license bureau, the Social Security Administration, to make large purchases such as furniture or automobiles, to talk with officials of private, public, or international schools, to help open banking accounts, assist with obtaining

homeowner's or renters and automobile insurance, utility connections and any other activities associated with the resettlement process.

**Ongoing Consulting:**

Services should include provisions for continuing as a resource to the family: be available to answer questions as they arise and assist with issues throughout the assignment. Plan to build compensation for a few hours of additional counseling time into your basic fee structure contained in your proposal but also offer services on a hourly basis with advance approval from the employer. Additional assistance may be needed later in the assignment such as new lease negotiation or rental assistance should they want to move before the assignment is over.

**Scheduling:**

Following is a sample itinerary assuming the employee and spouse are making an initial pre-decision trip which would allow four to five days for international resettlement activities.

- Day 1: Employee and spouse arrive in destination community and are met at the airport and escorted to hotel.
  
- Day 2: Employee meets with his or her new supervisor.  
Employee meets with employer's human resource representative.  
Employee meets with employer's tax advisor.  
Employee and spouse talk by phone or meet with Relocation Counselor (if sufficient discussion has been completed by phone prior to arrival, meeting may not be necessary).
  
- Day 3 Employee and spouse meet with Relocation Counselor for Needs Assessment (8:30-10:30)  
Associate conducts U.S. and local orientation presentations for employee and spouse (10:00-12 or 1:00)  
Associate takes employee and spouse to lunch and for afternoon orientation tour.
  
- Day 4: If appropriate based on employee's decision status, associate takes employee and spouse to schools, Social Security Administration to apply for card so that payroll and tax records can be established by the client company, to a bank to set up a banking relationship, and to see additional homes and amenities.
  
- Day 5: Employee completes any additional activities with assistance from broker or employer representatives, including securing temporary housing for their return trip if needed. Associate escorts them to the airport.

## Second “Permanent Arrival” Trip

1<sup>st</sup> Week Associate ensures that family is settled appropriately in temporary quarters or permanent rental.

If permanent housing has not been located, associate works with employee and spouse to finalize housing while coordinating with employee’s work schedule.

Associate and relocation staff assists family in registering children for school.

After housing is selected: Associate escorts employee and spouse to take driver’s license test once new address is known (make sure they have acceptable proof of residency such as copy of lease or whatever is required locally); assists employee with large purchases; and supports them if requested with other activities.

After move-in: Relocation Department remains available as questions arise throughout the duration of the assignment.

### **Client Reports:**

Relocation staff should provide daily verbal status reports to the corporate representative during the initial visit and follow-up with a written report. Depending on the volume and frequency of assignments for a corporation, you may wish to reach a mutually agreed-upon frequency for reports for employees after permanent arrival in the United States.

The most important aspect for successful service delivery is follow-up, follow-up, follow-up. After the orientation visits and initial resettlement services are completed, schedule phone calls and even personal visits or lunch dates, a few weeks, a month, and 6 months later to see if every one in the family is adjusting well in their new home and report back to the employer.

### **Fee Structures:**

There are a number of ways to charge for services:

- Hourly – Charge an hourly fee but be sure to determine the maximum amount of time the corporate client is comfortable with and assure them that you will not exceed that amount without prior authorization should more assistance be needed.
- Per diem – Charge a per diem amount and offer to cap the number of days without additional approval. You will still need to offer an hourly rate or half day charge in cases where another whole day is not needed.
- Project Fee – Flat fee for the service. The fee is determined in advance for a set menu of services, often tiered packages that allow flexibility for the corporate client. Don’t sell yourself short when you price these packages. You are offering valuable services and today’s corporations understand the value you bring in gaining a productive and happy transferee and family. Again, be prepared with an hourly rate for needs that arise that are not included on your menu.



Regardless of which fee structure you choose, make sure to factor in your hard costs for materials, shipping, long distance, etc.

Fee ranges are market sensitive. Hourly rates could be as low as \$50 per hour to over \$100. Per diems range from \$500 to \$1000 and higher. Packages may range from \$1500 to \$5000, depending on the time spent with each transferee and the services you offer.

You should estimate investments of your staff time including preparation and actual service delivery, hard costs such as compensation to the sales associate or rental assistance partner prior to setting fees and then decide upon an hourly rate that will allow you to make an acceptable profit and then back into your charges for the various tiers based on the time needed to deliver all of the components contained in each package. You can then quote an additional hourly rate for assistance that is needed over and beyond what you've listed in the service packages.

You can also unbundle services so a corporation can choose what services are needed for individual employees. For example:

Needs Assessment      \$250-\$300 (approx. 1½ hours with 2 counselors (associate and relocation staff member))

U.S./Local  
Orientation

Presentations      \$350 - \$500 (approx. 2-3 hours with 2 counselors)

Orientation

Touring & Escorting      \$1,600 - \$2400 for 20 – 30 hours with 1 counselor & staff support

Housing Assistance      Charge per hour for rental assistance or set flat rental assistance fee. If employee purchases a home through your company rather than renting, you could deduct charges billed for rental assistance from total fees due from client.

Ongoing Consulting      No charge for occasional routine telephone consultation after initial resettlement; if assistance is needed that will involve a considerable amount of time, contact the client with an estimate of cost and receive approval prior to proceeding.

This scenario allows you to give a close estimate of costs to the corporate client and you can agree in advance on maximum billing amounts per transferee based on individual needs – cost containment for the clients and flexibility for service delivery. Always offer to change program components as needed to meet individual needs and to customize a service package to meet the needs and financial goals of the corporation.

Make sure to bill the corporation immediately after the completion of the initial service package and request payment upon receipt. Be aware that some corporations will wait at least 30 days to make payment and you'll need to either pay sales associates out-of-pocket in advance or make sure they understand the lag time, if you use sales associates in your program. Provide associates with a form to log their time and make sure your billing appears professional.

Modify your current service evaluation form slightly and send to transferees 30 – 60 days after move-in. This will help you monitor quality service, be a tool in your marketing kit for future business development, help you determine other services you might develop, and address areas of concern in future training sessions.

### **Marketing International Resettlement Services:**

Sell features and benefits:

- **Single Point of Contact** – A designated person in your department will be available for the corporate representative and the transferee throughout the assignment monitoring service delivery and advocating for the employee.
- **Specially Trained Staff** – Caring, knowledgeable, and internationally certified counselors will assist the employee. If you have the benefit of multi-lingual staff, use that as a selling point as well.
- **Assistance Before, During, and After the Move** – Your services will introduce them to the area, assist them in finding the right home in a shorter period of time, get settled into it comfortably, and remain available after the move should questions or problems arise.
- **Time Savings for Corporate Staff** – Your services eliminate a significant time commitment from HR staff to provide this type of support, freeing them up for other duties and responsibilities.
- **Stress Reduction** – your counseling eases the way for the employee and helps address any uncertainties of the move for the transferee and his family. Your services benefit the company through increased employee satisfaction and productivity earlier in the assignment, thus helping ensure a successful outcome for all.

In addition to marketing to local corporations, market your services to local chambers of commerce, economic development departments and third party companies. Once you develop a reputation for delivering these specialized services, they will be likely to refer additional corporations with international assistance needs to you.

Consider putting together a short but highly visual PowerPoint presentation about your international resettlement sources. Utilize brief bullets on a colorful background and insert “international” theme photographs. There are great photos available for free over the Internet – Microsoft Clip Art Gallery.

Even if your program is not tremendously profitable at first, the ability to market these specialized services can help get your foot in the door at corporations who currently work with competitors or third party companies, especially if they are not meeting this need. Make sure to continuously market your other relocation services to the corporation. After you’ve demonstrated the professionalism you bring, ask for opportunities to work with some of their employees with domestic relocation needs as well.

Form relationships with international attorneys in your market who specialize in immigration services and with internationally certified public accountants.

Join local international organizations.

Promote your international capabilities on your company website.

Print area and company information in other languages.

## Chapter 4 – Training Sales Associates or Staff Members

This chapter contains tips for training international resettlement counselors, whether they are relocation staff members or qualifying sales associates. All counselor candidates should already be thoroughly trained on general domestic relocation practices. Then, build upon that foundation by focusing on the additional needs and issues inherent in international relocations.

The information on communication techniques and cross cultural awareness issues was developed from numerous sources including *Mobility* magazine articles, international websites, National Association of REALTORS publications, etc. This overview will not prepare you to offer in-depth, cross-cultural assistance as a service to corporate clients but will help your counselors establish rapport with foreign nationals more quickly, give them confidence and help avoid a major *faux pas*.

If you plan to utilize sales associates in delivering local international resettlement services, you may wish to create an international training module and special international designation. The following information can help you plan and implement such a program.

### Training Tips:

- An important component for any training program is to have the Relocation Director or staff person who planned the orientation tour, accompany each sales associate on a trial run to ensure consistency and a complete understanding of the importance of each site included in the tour.
- Define Settling in Services and what will be required after the move.
- Review Sample Itinerary and Schedule for typical assignment.
- Have sales associates attend a “Living in the United States” and “Welcome to (Your location)” presentation.
- Provide and review forms documenting the time they spend with the transferee and stating the maximum time allowed without prior authorization.
- Educate them as to why most transferees choose to rent instead of buying a home.
- Ensure associates are trained to offer professional rental assistance. If needed, develop specialized rental assistance training. Give them escape clause language for leases (see Chapter 2)
- Review needs assessment or other counseling questionnaires you plan to utilize.
- Review material contained in the International Guide or package you prepare.
- Define expectations clearly

- Review Compensation for Sales Associate Assistance – If you plan to charge separately for orientation tours and home search assistance, make sure sales associates understand the difference between the services and any compensation differences if applicable.
- Provide List of International Resources

### **Communication:**

- Speak more slowly; rephrase what you say to make sure you are understood
- Present major ideas in more than one way
- Use “plain” English and the most common words
- Use simple sentence structures and avoid superfluous words
- Avoid slang, unusual words or colloquialisms
- Avoid “word pictures” or sports images
- Enunciate clearly
- Define all acronyms
- Do not speak louder than normal because it can be perceived as talking down
- Avoid local sayings
- If using an interpreter, speak to the employee or family member, not the interpreter.

### **Cultural Awareness:**

- Be aware that people from other cultures think and behave differently. Variations occur in:
  - Personal Space (conversational distance, attitudes about body contact)
  - Physical Stance and Gestures (pointing and beckoning, nodding, head shaking, hand shaking or other hand gestures, body posture and orientation)
  - Voice Levels
  - Eye Contact
  - Use of Personal vs. Family Name
  - Clothing
  - Standards of Appearance
  - Willingness to ask or answer personal questions
- Take an interest in foreign countries and cultures.
- Do not use U.S. culture as the benchmark from which to compare others.
- Be patient, open, flexible and tolerant.
- Be cognizant of hierarchal differences between cultures.

Time and punctuality are different for various cultures:

- Americans and Northern Europeans see time sequentially; do one thing at a time from start to finish, view time as precious and, therefore, set schedules, are punctual and expect the same from others. They are offended if you show up late.
- Southern Europeans and Latin Americans see time synchronically, do more than one thing at a time and are habitually tardy. They do not believe in controlling time and place a higher value on relationships instead. Tardiness is not seen as a lack of respect.
- Emotional expression is fundamentally different for each culture. For instance, Chinese people can be perceived as cool and composed and emotional displays are perceived to convey weakness and disrespect; whereas the Italians, French and Spanish generally display emotions more freely and may perceive others to be distant if they do not demonstrate the same level of emotion.
- The Chinese and Japanese often feel that they will lose face if they ask questions and in many Asian cultures, looking at another person in the eyes is perceived as disrespectful while Americans believe that if someone doesn't look you in the eye they should not be trusted.
- To the British, when asked "How are you?", they expect you to listen to an in-depth accounting of how they truly are. If they ask you the same question and you respond with a cursory, "Fine", you'll be perceived as unfriendly.
- Some foreign nationals are truly overwhelmed at the choices available to them in the United States, especially when it comes to "mega" grocery stores or discount stores and outlets.
- The primary multi-cultural business rule is: never assume anything. You do not know what the employee or family may want or need.
- Handshaking is not so prevalent in other cultures and even when it is, the styles are different.
- Not all Asians bow, and if they do, bows can vary too. In Japan, the depth of a bow can signify the level of respect for the other party.
- Middle Eastern men often do not introduce women who are with them and you should not attempt to shake hands with the women unless they offer their hand first. It's best to say a polite greeting, and then hesitate for a moment giving the transferee an opportunity to offer the kind of greeting that is most comfortable for them and then mirror that gesture.
- Let the employee or family member set the "pace" and follow it – body language, tone of voice, physical distance, speech patterns and speed. Doing so helps establish rapport and helps the other person feel more comfortable. Do not get carried away and crossover into mimicry.

- Maintain an attentive, respectful demeanor at all times. Avoid excessive laughing or smiling that could be perceived as insincerity.
- Personal space – let the transferees establish a comfortable physical distance for them in discussions and then maintain it. Some cultures tend to stand more closely than others, and keep in mind that if they stand closer than what you are used to and you back up, they could be offended.
- Avoid gestures such as the thumbs up sign, pointing with your index finger, or closed thumb and index finger of “OK”.
- Use care and sensitivity when approaching the subjects of loan applications and credit issues. It is necessary, of course, but be cognizant that some Asian cultures consider it shameful to owe money to anyone and you may need to explain how common it is in the U.S. and that it’s customary for banks to loan money to a borrower, who pays it back with interest to compensate the bank.
- Since some cultures are reluctant to share information about cash availability, it’s best to give them a menu to show what would be required in a down payment utilizing a percentage and the bank financing the balance. Many lenders may also have applications available in the transferee’s own language.
- Some cultures place high importance on the exchange of business cards and how you treat cards can convey respect or lack of it. Some cultures in the Middle East and Asia believe the left hand to be unclean so always accept a business card with your right hand; don’t write on their business card; don’t give business cards that have been in your shirt pocket (body heat dishonors the card); never put their card in your pocket even if it’s inside a wallet; and if you are a woman never put the business card in a purse that will fall below the waist.
- Be cautious when giving gifts. The Japanese are enthusiastic gift givers in the business world but you should not outspend them because they perceive it as a loss of face on their part. In Asia, clocks symbolize death and colors can symbolize death too; in Mexico and Brazil purple flowers represent death while in Japan white flowers do. Many Europeans consider it an insult to give gifts before business is completed.

General behaviors to avoid until you get to know a foreign national include: asking personal questions or questions about family outside of those necessary to provide your services; using first names; putting your hands in your pockets; crossing your legs; showing the bottoms of your feet; fleeing or invading personal space, seeking direct eye contact; initiating physical contact; and showing impatience.

### **Above and Beyond Opportunities:**

- Offer to take the family shopping for school clothes for the kids. It's important for them to feel like they'll fit in and they probably won't know what others kids their age are wearing in your community.
- Stock the refrigerator in the corporate apartment with some basic staples prior to the family's arrival.
- Obtain keys, garage remotes and other items during an inspection of the property several days prior to the family's arrival. Address any outstanding repair or condition issues with landlord.
- Once housing is selected, review best travel routes for commuting to work, schools, shopping, etc. or better yet, do a trial run with them.
- Put a Welcome Basket in the hotel room before arrival during the first visit.
- Accompany family during their first visit to the grocery store.



## Multi-Cultural Etiquette

Source: National Association of REALTORS – At Home with Diversity  
Participant's Guide

- Learn phrases of the other's language
- Show appreciation for the other's customs, music, art: do not criticize
- Be sensitive and nonjudgmental on politics and religion. Avoid discussing, if possible.
- Build on the other's cultural heritage to enhance communication
- Show good intentions; follow-up on promises
- Extend respect to those the customer identifies with
- Use common sense and credit the other for also having it
- Acknowledge mistakes and apologize when appropriate
- Talk less in general and minimize talk about the U.S.
- Do not tell the other what to do
- Avoid family-related questions
- Share information and help others see the big picture
- Share the other's ceremonies
- Be formal; take more time doing business
- Be punctual even if the other is not
- Get names and connections right
- Take the blame for language difficulties
- Avoid jokes; they have a high probability of being misunderstood
- Show deference to the elderly (stand when they enter, wait for them to speak or extend their hands in greeting).
- Treat members of the opposite sex with respect. Err on the side of formality
- Be patient and forgiving if a member of the opposite sex has trouble determining how to treat you; remember that other cultures differ on the roles of men and women in business relationships and may have difficulty adjusting to expectations in the United States
- Skip the efforts to create an instant friendship
- Respect the concept of "face" – never do anything to embarrass another person, either in that person's eyes, in the eyes of others, or in your own eyes; in the same way, do not sacrifice your own face in front of others.
- Try to fit in

## Chapter 5 – Resources Forms and Proposal

### Books:

*Moving Minus Mishaps – Successful Family Relocation, Foreign and Domestic* by Beverly D. Roman and Paula A. J. Brisco

*Opening Doors: Selling to Multicultural Real Estate Clients* by Michael D. Lee, CRS

*Basic Concepts of Intercultural Communication: Selected Readings* by Milton Bennett

*Cross-Cultural Dialogues – 74 Brief Encounters with Cultural Difference* by Craig Storti

*Developing Intercultural Awareness: A cross-cultural Training Handbook* by L. Robert Kohls and John M. Knight

*American Cultural Patterns: A Cross Cultural Perspective* by Edward C. Stewart and Milton J. Bennett

*The Art of Crossing Cultures* by Craig Storti

*American Ways* by Gary Althen

*Communicating with Customers Around the World* by K. C. Chan-Herur

*Gestures: Do's and Taboos of Body Language Around the World* by Roger E. Axtell

*Kiss, Bow or Shake Hands: How to Do Business in Sixty Countries* by Terri Morrison, Wayne A. Conaway and George A. Borden

*Riding the Waves of Culture* by Alfons Trompenaars

*Multicultural Manners* by Norine Dresser

*International Business: A Basic Guide for Women* by Tracey Wilen

*International Business Etiquette – What you need to know to conduct business abroad with Charm and Savvy* by Ann Marie Sabath

## Websites:

Newsletters and training materials,  
Other helpful links

[www.interculturalpress.com](http://www.interculturalpress.com)

[www.culturelink.org](http://www.culturelink.org)

[www.etiquetteintl.com](http://www.etiquetteintl.com)

[www.executiveplanet.com](http://www.executiveplanet.com)

Appliance Conversion Information

[www.220voltappliances.com](http://www.220voltappliances.com)

International Calling Codes  
(American Computer Resources)

[www.the-acr.com](http://www.the-acr.com)

International Calendars and Time Zones

[www.timeanddate.com](http://www.timeanddate.com)

Steve Kropla's Help for World Travel

[www.kropla.com](http://www.kropla.com)

Foreign born individuals entering or living in the  
U.S.

[www.foreignborn.com](http://www.foreignborn.com)

Booklets and reference materials

[www.conquest-corp.com](http://www.conquest-corp.com)

- Immigration Made Simple
- Hello! USA
- Put Your Best Foot Forward: USA
- Tips on Living and Doing Business in the United States

[www.interchangeinstitute.org](http://www.interchangeinstitute.org)

Videos and other Resources

- Includes Living in the USA video
- Publications, online newsletter, tips

[www.griggs.com](http://www.griggs.com)

[www.branchor.com](http://www.branchor.com)

[www.interchangeinstitute.org](http://www.interchangeinstitute.org)

Conversion table for money

[www.oanda.com/convert/cheatsheet](http://www.oanda.com/convert/cheatsheet)

International calling codes

[www.the-acr.com](http://www.the-acr.com)

Locations of embassies and consulates

[www.embassyworld.com](http://www.embassyworld.com)

U.S. Department of Immigration &  
Naturalization Service

[www.uscis.gov/portal/site/uscis](http://www.uscis.gov/portal/site/uscis)

American Immigration Center

[www.us-immigration.com](http://www.us-immigration.com)

U.S. State Dept

<http://www.state.gov/>

Center for International Assignment Management (CIAM)

Affiliated with Employee Relocation Council

[www.worldwideerc.org](http://www.worldwideerc.org)

- Non-members can access publication lists, link to other sites with lots of helpful information, such as the American Immigration Lawyers Association, Atlapedia Online with maps and statistics on countries of the world, CIA World Fact Book, The Electronic Embassy, International Dialing Codes, Exchange Rates and more.

CIAM members can view numerous publications online and access other resources in addition to those available to non-members.

Language Translation:

Altavista offers free text translation on the web utilizing “Babel Fish”, 6 different languages and up to 40 sentences

[www.altavista.com](http://www.altavista.com)

Online dictionaries and language instruction

[www.Travlang.com](http://www.Travlang.com)

AT&T Language Line – 24 hour a day, 7 day a week language translation from English to 140 different languages. No reservation needed, charged by the minute and a fee per call, billed to credit cards. Call 800.628.8486 to access and for program information. For monthly service packages call 800.752.0093. Or visit:

[www.language.com](http://www.language.com)

Furniture Leasing – CORT

[www.cort.com](http://www.cort.com)

National furniture leasing company with online shopping and over 100 showrooms across the country.

Conversion Charts – clothing, temperature, Weights and measures

[www.americanexpress.com](http://www.americanexpress.com)  
(see travel tips section)

International Real Estate Institute  
U.S. Chamber of Commerce  
International Policy and Programs  
1615 H Street N.W.  
Washington, D.C. 20062-2000

320/763-4648 (tel)  
[www.uschamber.org](http://www.uschamber.org) or  
[www.cipe.org](http://www.cipe.org)  
202/463-5460 (tel)  
202/463-5836 (fax)

## Sample Needs Assessment Form

Date: \_\_\_\_\_

Corporate Client: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Fax # \_\_\_\_\_

File # \_\_\_\_\_

### Transferee Information

Name: \_\_\_\_\_

Partner/Spouse: \_\_\_\_\_

Title: \_\_\_\_\_

Home Country: \_\_\_\_\_

Orientation Trip Date: \_\_\_\_\_

Homesearch Date: \_\_\_\_\_

Start Date with Corporate Client: \_\_\_\_\_

International Driver's License  Yes  No

Home Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Current Office Phone: \_\_\_\_\_

e-Mail Address: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Hotel Accommodations: \_\_\_\_\_

Hotel Phone: \_\_\_\_\_

Hotel Address: \_\_\_\_\_

Temporary Living Assistance Needed?  Yes  No

Temporary Address: \_\_\_\_\_

Temporary Phone: \_\_\_\_\_

New Work Address: \_\_\_\_\_

New Work Phone: \_\_\_\_\_

New Work Fax: \_\_\_\_\_

New Work e-mail: \_\_\_\_\_

### Home Search Information:

Rent  Purchase

If renting, Housing Allowance: \$ \_\_\_\_\_ Includes Utilities?  Yes  No

If Purchasing, Price Range: \_\_\_\_\_

Move-In Date: \_\_\_\_\_

## Needs Assessment

**Housing Type:**

Apartment       Townhouse       Condo       Single Family

**Location:**

Urban       Suburban       Rural

**Acceptable Commute Time:** \_\_\_\_\_

**Commuting Transportation (Car, Train, Bus,)** \_\_\_\_\_

**Special Needs:**

# of Bedrooms: \_\_\_\_\_ # of Baths: \_\_\_\_\_

Garage:  One Car  Two Car  Other \_\_\_\_\_

Appliances Needed: \_\_\_\_\_

**In-Law or Nanny Suite?** \_\_\_\_\_

**Formal Rooms:** \_\_\_\_\_

Heat Type:  Gas  Oil  Electric  Other \_\_\_\_\_

**Oversized Furniture Being Shipped?** \_\_\_\_\_

**Approximate Size:** \_\_\_\_\_

**Other Preferences:** \_\_\_\_\_

**Family Profile:**

<u>Dependent</u> <u>s</u>	<u>Ages:</u>	<u>Primary</u> <u>Language</u>	<u>English</u> <u>Language</u> <u>Skills</u>	<u>School</u> <u>Requirements</u>	<u>SPECIAL</u> <u>Needs</u>

**Spouse Occupation/Interests:** \_\_\_\_\_

**Pets:**  Yes  No

If yes, does employee understand entry requirements? \_\_\_\_\_

**School Preferences**  Private  Public

**Do any family members wish to pursue English language skills instruction after arrival in (location)?** \_\_\_\_\_

**Are there any special needs (medical, religious affiliations, specific foods, etc.)?**  
\_\_\_\_\_

**Are there any hobbies or sports that the employee or family would like to pursue in (location) should additional research be needed on availability?**  
\_\_\_\_\_

**Other Interest/Concerns:**  
\_\_\_\_\_

**How much knowledge does employee or family have of the (location) area?** \_\_\_\_\_

**Have the employee or family members traveled or lived abroad previously? If yes, for business or pleasure, where and for how long?**  
\_\_\_\_\_

**Will the family be traveling together or will the employee arrive ahead of the family?**  
\_\_\_\_\_

## **Sample Cover Letter to go with Welcome Package or Resource Booklet**

We are pleased to have the opportunity to assist you and your family in relocating to (location) with (Corporate Client). We will help you find appropriate housing, identify resources for you and ensure that you get settled comfortably into our community.

Our international counselors are specially trained and are sensitive to the unique needs and challenges for foreign nationals moving to the United States. They are knowledgeable and caring individuals who know how important it is to provide assistance allowing you to make the right choices for the most successful and rewarding tenure for you and your entire family.

The information contained in this package (or booklet) will help you prepare for your international relocation. Your counselor will review much of the materials with you during a thorough needs assessment by phone (or in person upon your arrival), but taking the time to read it prior to that conversation will give you an opportunity to identify specific areas of interest or concern in more detail.

We look forward to meeting you soon and encourage you to contact us at anytime with questions or special requests. We are committed to facilitating and enhancing your relocation experience.

Cordially,



## Pre-Departure Checklist

### Important Documents:

- Airline Tickets**
- Passports** for each family member (Times vary in different countries for how long it takes to receive a passport after application and for how long they are valid. In most countries the following is required to apply for a passport: previous passport [if applicable], an original copy of a birth certificate or other proof of citizenship, proof of identity such as a driver's license and two identical 2" x 2" photos).
- Visas** – official authorization appended to a passport, permitting entry into and travels within a particular country or region.
- Work Permit** – Your employer will assist you in acquiring. Each individual who will be employed needs a permit. Permits are not usually granted unless employment has already been arranged.
- Immigration & Naturalization Service (INS) Documents** – originals of all paperwork including Alien Registration Receipt Card or other forms.
- Driver's License(s)** – From your home country and/or international driver's license.
- Medical and Dental Records** – Each family member should have complete medical and dental examinations at least 3 months prior to going abroad. Copies of these records and any x-rays could be very beneficial should a medical emergency occur.
- Prescriptions** – Pack a good supply of any prescription medicine as well as any other medications you use regularly. Make sure to bring a copy of any prescriptions in generic terms for easier refilling once you arrive in the U.S.
- School Records or Transcripts**
- Marriage and divorce certificates**
- Financial Records** – Credit letter from your current bank, account information, etc. to assist with opening new accounts and obtaining housing in the United States. If you plan to rent a home, ask your employer for a letter which may be required by property owners to verify employment. If you plan to purchase a home in the United States, also bring documentation of 12 months previous home mortgage or rental payments, 3 months of bank statements for checking, savings, investment accounts, employment letter and verification of income (four most recent paycheck stubs, list of open credit accounts such as charge accounts, car loans, or other loans (include account numbers, minimum monthly payment amounts and account balances)
- Birth Certificates** and any adoption or legal guardian papers for each member of the family.

- **Proofs of purchase** and or appraisals for valuable articles to help with any customs questions upon your return home and in the event of losses in transit, theft, burglary, etc. while living abroad.
- **Inventory of Household Goods Shipment** – Before packing, make a thorough list of every item in your household goods shipment and what its replacement value would be in the United States. This inventory is necessary to process any claims in the event of damage to any of your property. This inventory also provides a record of items taken out of your home country so you will not have problems bringing them back through customs. Foreign-made items, such as cameras, watches and electronic equipment, should be registered with your national customs service prior to departure to avoid paying duties on them when returning. Contact your national customs office for required forms.

### **Other Items and Actions Needed:**

- **Money** – Bring a sufficient amount of cash in United States currency for essentials and transportation costs such as tips, or an international cashier's checks or traveler's checks to use until new bank accounts are opened and accessible.
- **Voting** – Check your country's regulations regarding absentee voting procedures if you wish to continue voting in your home country national and local elections during the assignment in the United States.
- **Pets** – If you plan to bring pets into the United States, check with United States Customs Service to verify permissions and any requirements regarding current health documentation or quarantine periods.
- **Health Insurance** – Check with your employer to ensure appropriate medical and hospitalization insurance coverage is in place.

## United States Holidays

January 1	New Year's Day	First Day of the New Year
March or April	Easter (Sunday)	Christian religious holiday
May (Last Monday)	Memorial Day	Commemoration of men and women who died in service to the United States
July 4	Independence Day	Birthday of U.S., commemoration of Declaration of Independence from Great Britain in 1776
September (First Monday)	Labor Day	Recognizes U.S. workers
November (Fourth Thursday)	Thanksgiving	A day of being thankful
December 25	Christmas Day	Religious holiday celebrating birth of Christ

### Secondary U.S Holidays:

Some employers and many government offices are closed

January (Monday nearest 1/25)	Martin Luther King, Jr. Day	Commemoration of civil rights leader's Birthday
February (Monday nearest 2/20)	President's Day	Birthday of 2 U.S. Presidents George Washington & Abraham Lincoln
October (Monday nearest 10/12)	Columbus Day	Commemoration of discovery of America
November (Monday nearest 11/11)	Veteran's Day	Commemoration of men and women who have served in the U.S. military

### Other Holidays:

Businesses do not close, but many people celebrate

February 14	Valentine's Day	Celebration of Romance & loved ones
March 17	St. Patrick's Day	Irish heritage celebration
May (Second Sunday)	Mother's Day	Day to honor all mothers

June (Third Sunday)	Father's Day	Day to honor all fathers
October 31	Halloween	Eve of All Saint's Day

**Some ways in which holiday are celebrated include:**

New Year's Eve	Dinner parties, dances & celebrations welcoming the New Year
New Year's Day	Family and friends get together for meals and watch football games on T.V.
Valentine's Day	Send or give greeting cards, candy, flowers or small gifts to your sweetheart. Young children exchange special greeting cards
St. Patrick's Day	Many Irish and non-Irish people wear green clothing and go to parties at Irish pubs to eat traditional Irish foods and drink green beer.
Easter	It is traditional for the "Easter Bunny" to bring candies and colored eggs in baskets to children to find on Easter morning. Christians attend church and special services celebrating the resurrection followed by family meals.
Mother's Day & Father's Day	Children give cards and presents or do special things for their parents.
Memorial Day Independence Day & Labor Day	Picnics, Barbecues, Trips to the Beach. The three holidays have come to signify beginning of summer, midpoint of summer and end of summer.
Halloween	Children dress in costumes to go to parties or ring neighbor's doorbells, greeting residents with "Trick or Treat", after which they are given candy or other treats. Many adults attend costume parties.
Thanksgiving	Friends and family gather for a feast with traditional foods including turkey and dressing, cranberries, sweet potatoes & pumpkin pie.
Christmas	Many people attend church on Christmas Day or Christmas Eve, friends and family gather to exchange gifts, decorate a Christmas Tree, sing Christmas carols and "Santa Claus" brings gifts for children.

**International  
Resettlement  
Assistance  
Program**

Proposed for

**(Name of Corporation)**

(Date)

In an economy which is increasingly global in nature, many American companies are doing business abroad, and, in the process, are hiring foreign nationals and relocating them to the United States for temporary assignments. These assignments bring new demands upon the human resource staff or other managers because the normal relocation issues and concerns are multiplied several times for both the corporation and the transferee and family. The costs for an international assignment are also multiplied many times.

Our international resettlement services were designed to provide an extra dimension of resettlement assistance to these international transferees and to help protect the corporation's substantial investment by assisting with the family's assimilation into that (insert locations) lifestyle, reducing the home search and resettlement timeframe, increasing employee productivity, and helping all parties realize a successful outcome.

(Insert company name)'s program provides emotional support in adapting to a totally new environment, as well as very practical, hands-on support to the transferee and family. Often, the employees selected for international assignments may be well-traveled individuals who are familiar with the United States culture, but their families may feel overwhelmed by their new surroundings. And because the family's happiness is essential to the contentment and productivity of the employee, it is important to address their needs and help facilitate their adjustment to this country.

Our international team is comprised of (insert any statistics regarding foreign languages spoken by your staff or other relative information regarding their personal international experience) who have specific area knowledge, have received special international relocation training, and are sensitive to assisting families who are relocating to the U.S. Every team member brings personal and professional empathy, and a caring attitude to individual assignments.

### **Range of Services:**

Our services are customized on a case-by-case basis as recommended by your corporation for the individual needs of an international transferee. The program consists of the following services that can be utilized "a la carte" or in the packages outlined in the fee schedule.

1. **Initial Consultation and Needs Assessment** - Communicating with the employee in the home country prior to arrival, if possible, to explain the program, our commitment to service, and the many ways in which we can help. (Insert appropriate staff person or Our International Counselor) will conduct a thorough needs assessment for the family and advise them on items they will need to bring with them to expedite getting driver's licenses, establishing credit, etc.
2. **Information Package (Booklet)** – Sending a comprehensive information package on both the (location) area and general U.S. customs. This includes such items as geography, climate, schools, recreation, metric conversions and much more.
3. **Living in the USA and Welcome to (location) Presentations** – Conducting an audio-visual presentation for the transferee and spouse on living and working in the U.S. and specifically, our city. This covers cultural differences as well as the practical aspects of transportation, shopping, government, legal issues, housing, etc.

4. **Orientation Tour** – The typical tour typically covers some or all of the following, depending on time available, where the family is likely to be living and work, and their specific interests:
  - a. Residential Areas
  - b. Shopping/commercial districts including inside of a grocery store for home country selection and price comparisons
  - c. Schools, day care facilities, often going inside
  - d. Local landmarks, amenities, and recreational facilities
  - e. Transportation venues
  - f. Work location
  - g. Other stops requested by the transferee or spouse
5. **Homesearch** – Hands-on education and assistance in the home search process whether the employee chooses to rent or purchase. This includes locating suitable housing and lease or contract review and negotiation. We will encourage the employee to follow the company’s recommendations relative to renting or purchasing a home.
6. **Specialized Research** – Research into availability of special family interests such as hobbies, sports, specialty foods or other needs.
7. **Airport Reception and Transportation** to and from hotel.
8. **Logistics Assistance** – Escorting the employee and family to set up bank accounts, obtain Social Security cards and driver’s licenses, shopping for items such as furniture or cars, school registrations, language class enrollment, public transportation usage, and many other functions we take for granted.
9. **Ongoing Counseling** – We will position ourselves with the transferee and family as their continuing resource while beginning their new lives in (location). We will follow-up with them regularly after the initial services are completed to see how they are adapting and offer support if additional needs or concerns are uncovered. If a need arises that will entail substantial expense or time to address, we will contact you regarding expense authorization prior to offering specific assistance.

(Optional – insert sample schedule for visit as contained in Chapter 3)

**Fees:** (After you determined your hourly rate, use the time estimates below to set package prices)

Needs Assessment                    \$\_\_\_\_\_ (approx. 1 ½ hours, 2 counselors & additional research)

U.S. Local/ Orientation  
Presentations                    \$\_\_\_\_\_ - \$\_\_\_\_\_ (approx. 2-3 hours with 2 counselors)

Orientation Touring  
And Escorting                    \$\_\_\_\_\_-\$\_\_\_\_\_ (approx. 20 – 30 hours with 1 counselor & staff support)

Housing Assistance                    Assistance for housing search will be charged within the above hourly-fee parameters. If the employee buys a home through (insert company name) rather than renting, charges billed for housing search time will be deducted from total fees paid by client.

Ongoing Consulting      No charge for occasional routine telephone consultation after initial resettlement; if assistance during this extended period involves a project which represents considerable counselor time, the client will be contacted with an estimate of cost before proceeding.

Total      The total fee for the initial visit should be in the \$\_\_\_ to \$\_\_\_ range and will be capped at \$\_\_\_\_. Rental assistance should be in the range of \$\_\_\_ to \$\_\_\_\_. (If possible give dollar amounts for rental assistance range based on estimated time to locate and show properties in your market)

Additional hours for special needs outside of services listed or if the transferee and family require more time than outlined above are available at \$\_\_\_ per hour.

### **Conclusion:**

Even for the seasoned world traveler, moving to a new country with a different culture, different cost-of-living and unfamiliar procedures and lifestyle practices can be a significant challenge. For the family, who may be even less familiar with the destination country, the prospect of living here can be daunting. And yet, in order for an international assignment to result in a productive employee whose mind is focused on the job and not on the difficulty of assimilating into the U.S. lifestyle, it is essential that these challenges be overcome.

The initial visit to the U.S., finding appropriate housing in a neighborhood that provides a comfortable environment, and relieving the concerns of the spouse or partner are all critical to how well the employee and family adjust. If (insert name of company) facilitates these early steps in the assimilation process by utilizing our resettlement services, you and your international employees will benefit. When the high cost of relocating such employee' is considered, the additional modest cost of this program is a very reasonable and cost effective means of accomplishing a smooth transition, and it can, in fact, make the difference between a successful international assignment and a failed one.

Our services can be customized to meet your corporate relocation needs and specialized to address the unique needs of your transferees. Providing them will ensure international assignments start out on the right track and help ensure a successful outcome. We would welcome the opportunity to support (insert company)'s international relocation goals.



## CONVERSION CHARTS

### Weight

1 pound (lb) = 16 ounces (oz.)

#### Metric Weight Conversion Chart

Lb = Kg	Kg = Lb
1 = 0.45	1 = 2.21
2 = 0.91	2 = 4.41
3 = 1.36	3 = 6.61
4 = 1.81	4 = 8.82
5 = 2.27	5 = 11.02
6 = 2.72	6 = 13.23
7 = 3.18	7 = 15.43
8 = 3.63	8 = 17.46
9 = 4.08	9 = 19.84
10 = 4.54	10 = 22.05
50 = 22.68	50 = 110.23
100 = 45.36	100 = 220.46

### Volume (Liquid Measure)

1 cup	=	8 liquid ounces
1 pint	=	16 liquid ounces (2 cups)
1 quart	=	32 liquid ounces (2 pints or 4 cups)
1 gallon	=	128 liquid ounces (4 quarts or 8 pints or 16 cups)

#### Metric Volume Conversion Chart

Gal = L	L = Gal
1 = 3.79	1 = 0.26
2 = 7.57	2 = 0.53
3 = 11.35	3 = 0.79
4 = 15.14	4 = 1.06
5 = 18.93	5 = 1.32
6 = 22.71	6 = 1.58
7 = 26.5	7 = 1.85
8 = 30.28	8 = 2.11
9 = 34.16	9 = 2.38
10 = 37.94	10 = 2.64
50 = 189.70	50 = 13.2
100 = 379.40	100 = 26.4

## Linear

A basic length measurement in the United States is the inch (2.54 centimeters)

12 inches	=	1 foot (3.2 feet = approx. 1 meter)
3 feet (36 inches)	=	1 yard
5280 feet	=	1 mile

### Metric Length Conversion Chart

In	=	Cm	Cm	=	In
1	=	2.54	1	=	0.40
2	=	5.08	2	=	0.80
3	=	7.63	3	=	1.20
4	=	10.16	4	=	1.60
5	=	12.70	5	=	2.00
6	=	15.24	6	=	2.40
7	=	17.78	7	=	2.80
8	=	20.32	8	=	3.20
9	=	22.86	9	=	3.50
10	=	25.40	10	=	3.90
11	=	27.94	11	=	4.30
12	=	30.48	12	=	4.70

Distance is measured by the mile (mi).

### Metric Distance Conversion Chart

Mi	=	Km	Km	=	Mi
1	=	1.61	1	=	0.62
2	=	3.22	2	=	1.24
3	=	4.83	3	=	1.86
4	=	6.44	4	=	2.46
5	=	8.05	5	=	3.11
6	=	9.66	6	=	3.37
7	=	11.27	7	=	4.35
8	=	12.88	8	=	4.97
9	=	14.48	9	=	5.59
10	=	16.09	10	=	6.21
50	=	80.47	50	=	31.07
100	=	160.9	100	=	62.14

## Temperature

The U.S. measures air temperature by the Fahrenheit scale. To convert Fahrenheit to Celsius: Take the number of degrees Fahrenheit, subtract 32, multiply by 5, divide by 9 and round up.

### Temperature Conversion Chart

F degrees	C degrees
32	0
40	5
50	10
60	15
70	20
85	25
85	30
105	40
140	60
175	80

### Measurements for Cooking:

1 Quart (qt)	=	1 liter (approximately)
1 Pint (pt)	=	½ liter (approximately)
1 Pound (lb)	=	500 grams
1 Teaspoon (tsp)	=	2 liquid grams
1 Tablespoon (Tbsp)	=	6 liquid grams

### Oven Temperatures:

<u>Degrees Fahrenheit</u>	<u>Celsius</u>	
140 – 250 degrees	70 – 121 degrees	(low heat or slow cooking)
300 – 400 degrees	50 – 205 degrees	(medium or moderate)
400 degrees & up	205 degrees up	(hot or maximum)

## Clothing Conversions

### Women's Suits and Dresses:

United States	UK	Continental Europe	Japan
4	6	36	3
6	8	38	5
8	10	40	7
10	12	42	9
12	14	44	11
14	16	46	13
16	18	48	15
18	20	50	17
20	22	52	19

### Men's Suits & Overcoats

United States	UK	Continental Europe	Japan
34	34	44	S
36	36	46	
38	38	48	M
40	40	50	L
42	42	52	
44	44	54	LL
46	46	56	
48	48	58	
50	50	60	
52	52	62	

### Men's Shirts

United States	UK	Continental Europe
13.5	13.5	34
14	14	36
14.5	14.5	37
15	15	38
15.5	15.5	39
16	16	40
16.5	16.5	41
17	17	42
17.5	17.5	43
18	18	45

### Women's Shoes

United States	UK	Continental Europe	Japan
5	3	36.5	23
5.5	3.5	37	23.5
6	4	37.5	24
6.5	4.5	38	24.5
7	5	38.5	25
7.5	5.5	39	-
8	6	40	-
8.5	6.5	40.5	-
9	7	41	-
9.5	7.5	42	-

### Men's Shoes

United States	UK	Continental Europe
7	6	38.5
7.5	6.5	39
8	7	40.5
8.5	7.5	41
9	8	41.5
9.5	8.5	42
10	9	43
10.5	9.5	44
11	10	44.5
11.5	10.5	45
12	11	46

**NOTE:** Conversion charts for clothing, and shoes especially, are not exact.