

Chapter 10.02: Separation and Resettlement Benefits

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Section 1: Purpose

1.1 General

The Fund provides resettlement benefits to eligible staff members and their qualifying family members to offset the costs of relocating, along with moving personal and household effects, to the approved resettlement destination upon separation or retirement from the Fund. In addition, staff members whose letters of appointment are dated before July 1, 2011, are eligible to receive a separation grant as provided in Section 12.

1.2 Applicable Benefits

Resettlement travel and shipping benefits will be provided to eligible staff members and their qualifying family members regardless of the chosen location, so long as it is more than 35 miles from the **staff member**¹'s present dwelling and from their office premises. Resettlement benefits consist of the following:

- i. a resettlement allowance (Section 3);
- ii. **resettlement travel**² and related expenses (Section 4–5);
- iii. shipping expenses for personal and household effects, as well as an excess baggage allowance (Section 6);
- iv. travel accident and accompanied baggage insurance (Section 7); and
- v. transit insurance for unaccompanied air and surface shipments for staff who choose to use the Fund's shipping contractor (Section 7).

Section 2: Eligibility for Resettlement Benefits

2.1 General

Subject to paragraph 2.2, upon separation from the Fund, staff members who have met the required period of service as set out in paragraph 2.3, and their qualifying family members are entitled to resettlement benefits (travel, resettlement shipping and resettlement allowance) to a resettlement destination of their choice at Fund expense, within the applicable travel cost limit, so long as the resettlement destination is more than 35 miles from the **staff member**³'s present dwelling and from their office premises. Resettlement benefits will also be provided in the event of the death of a staff member or qualifying **family member**⁴ as provided in paragraph 2.8.

2.1.1 Qualification Criteria for Family Members

The staff member's **spouse**⁵ and children will qualify for resettlement benefits, provided that:

- i. the staff member is eligible for **family-related benefits** according to Chapter 2.02, section 2.5 as of the date of the staff member's separation from the Fund (or the date of application for benefits under subparagraph 2.1.2); and

¹"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

²"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

³"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

⁴"Family Member" means a spouse or a child as set out in Chapter 2.02, Section 2.5 (Appointment Benefits).

⁵"Spouse" shall have the meaning set out in Chapter 2.02, Section 2.4.1 (Definition of "Spouse").

- ii. they have been domiciled in the staff member's household at the duty station for one year or more prior to the staff member's separation (or the date of application for benefits under subparagraph 2.1.2).

Notwithstanding (ii) above:

- a. Children who are being educated in the staff member's home country at the time of the staff member's separation from the Fund (or the date of application for benefits under subparagraph 2.1.2) are eligible for resettlement shipping and the resettlement allowance but are not eligible for **resettlement travel**¹ if the staff member is resettling to the home country. If, instead, the staff member is resettling outside the home country, the **child**² will be eligible for resettlement travel, from the recognized home country to the resettlement destination within the cost limit of the duty station to the resettlement destination, or home country to the resettlement destination, whichever is less.
- b. Children who are being educated in a third country at the time of the staff member's separation from the Fund (or the date of application for benefits under subparagraph 2.1.2), are eligible for resettlement shipping, resettlement allowance, and resettlement travel from the school to the resettlement destination within the cost limit of the duty station to the resettlement destination, or school location to the resettlement destination, whichever is less. Resettlement benefits shall be authorized from the duty station for these children if they have been domiciled in the staff member's household at their duty station for 30 days or more immediately before the staff member's separation date (or the date of application for benefits under subparagraph 2.1.2).

2.1.2 Children Losing Eligibility for Family-related Benefits

A staff member must apply for resettlement benefits for their eligible children prior to the date the child loses eligibility for the **family-related benefits** according to Chapter 2.02, section 2.5. The staff member will have up to one year after the child loses such eligibility, or the staff member's separation, whichever comes first, to use these benefits. Resettlement benefits shall not be approved in respect of a person who has indicated an intention to reside in the **duty station area**³.

2.1.3 Parents, Parents-in-law, and Other Family Members

Staff members are not eligible for resettlement benefits with respect to parents, parents-in-law or other family members other than qualifying spouses and children, except as provided below. A staff member may downgrade the cost of the entitled air travel class, for their own and any eligible family members' resettlement travel, and to apply the balance towards a one-way travel, by direct or indirect route, so that any parent, parent-in-law, or child who is not eligible for resettlement travel at Fund expense may accompany the staff member to the resettlement destination. This remaining balance may not be used for any other purpose.

In the case of staff members hired onto the staff before May 3, 1996, parents or parents-in-law of a staff member will qualify for resettlement travel if the staff member certifies that they meet all of the following requirements:

- i. they were present in the United States, or had benefits approved, prior to May 3, 1996;
- ii. they had resided with the staff member for one year or more prior to their separation; and
- iii. they will continue to live with and be dependent on the staff member after separation.

¹"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

²"Child" shall have the meaning set out in Chapter 2.02, Section 2.5 (Appointment Benefits).

³"Duty Station Area" means an area within a 35-mile radius from the duty station. For the purposes of "Arrangements for Hybrid Work and Other Forms of Telework" only, "Duty Station Area" means the Washington-Baltimore-Arlington Consolidated Metropolitan Area as defined by the US Office of Personnel Management Locality Pay Area Definitions (published at opm.gov).

2.1.4 Separated or Divorced Spouses or Terminated Domestic Partners

When a staff member who is eligible for resettlement benefits separates from or divorces their spouse, or terminates their recognized domestic partnership, the Director of HRD may approve resettlement benefits for the spouse, former spouse, or terminated domestic partner if this person will reside outside the duty station area and if, in the judgment of the Director, granting the benefits will carry out the purposes of this Chapter. In this event, resettlement benefits shall be the regular benefit for early repatriation in advance of the staff member (i.e., 50 per cent of the resettlement allowance, as set forth below in paragraph 3.2.1), travel and a shipment of effects up to the basic limits set for a staff member without family. The spouse, former spouse, or domestic partner may elect to resettle to any place of their choosing; however, if the staff member is eligible for the Expatriate Allowance, the resettlement benefits for the spouse, former spouse, or domestic partner shall be restricted to the cost limits of resettlement to the staff member's home country or place of recruitment, whichever is greater. If the staff member is not eligible for the Expatriate Allowance, resettlement benefits for the spouse, former spouse, or domestic partner shall be restricted to the cost limits of resettlement to the most distant city on the mainland of the **duty station country**¹. Resettlement benefits shall not be approved in respect of a person who has indicated an intention to reside in the duty station area, or whose departure would take place more than one year after the separation, divorce, or termination of partnership. This provision will not affect the entitlements for resettlement benefits for any future spouse or recognized domestic partner of the staff member.

2.2 Adjustment of Resettlement Benefits

Resettlement benefits for the staff member and eligible dependents may be reduced, adjusted, prorated, or eliminated for any of the following circumstances:

- i. Qualifying service of less than 2 years (paragraph 2.3);
- ii. Part-time work status (paragraph 2.4);
- iii. Spouse eligibility for resettlement benefits as an employee of the IMF (paragraph 2.5) or another organization;
- iv. Abandonment of position or misconduct (paragraph 2.6);
- v. Coverage of resettlement expenses by a prospective employer (paragraph 2.7).

2.3 Reduced Benefits for Short Service

Staff members who separate from the Fund before completing two years of service, or whose children lose eligibility before this time, will be eligible for reduced resettlement benefits, including resettlement travel. The Resettlement Allowance set out in Section 3 will be prorated based on the number of months served, and travel and shipping benefits will be reduced. However, staff members who separate from the Fund for any of the following reasons will be eligible for full resettlement benefits, regardless of how long they have been employed by the Fund:

- i. medical reasons "Separation at the Fund's Initiative";
- ii. "Reduction in Strength, Abolition of Position or Change in Job Requirements";
- iii. "Unsatisfactory Performance"

2.3.1 Pro-rated Shipping Benefits for Early Separation

With respect to shipping in connection with resettlement, staff members who separate from the Fund before completing two years of service will be entitled to pro-rated benefits, as follows:

- i. if the lump-sum shipping option is used: one twenty-fourth of the applicable lump-sum shipping and excess baggage allowance for each month of Fund service upon separation; or

¹"Duty Station Country" means the country where the staff member's duty station is located.

- ii. if the Fund's shipping contractor is used: one twenty-fourth of the excess baggage allowance for each month of Fund service upon separation. No pro-ration will be allowed for use of a container.

2.4 Part-Time Staff Members

With respect to the eligibility of staff members on **part-time**¹ appointments for resettlement benefits, part-time service periods will be recalculated to establish the full-time service equivalent, which will be used to determine whether the staff member is eligible for full or reduced benefits.

2.5 Fund/Fund Couples

If both spouses of a Fund/Fund couple are eligible for resettlement benefits in their own right, their resettlement benefits will be coordinated as set forth in Section 10 of this Chapter.

2.6 Loss of Eligibility for Resettlement Benefits

Staff members who separate from the Fund by virtue of abandonment of position or termination for misconduct may lose eligibility for resettlement benefits in whole or in part.

2.6.1 Abandonment of Position

The Director of HRD will determine, on a case-by-case basis, the eligibility for resettlement benefits of staff members who abandon their position, as set out in "Abandonment of Position"

2.6.2 Separation for Misconduct

Staff members who are separated for misconduct, as set out in "Misconduct" and "Disciplinary Measures" will not be entitled to any resettlement or other separation benefits. However, in exceptional circumstances, the Director of HRD may authorize full or reduced resettlement benefits.

2.7 Non-duplication of Benefits

Reimbursement from the Fund shall not be claimed or accepted for any expenses that have already been paid, or will be reimbursed, by any other source, e.g., a new employer, government agency, or insurance company, for staff members or their family members. All staff will be required to certify that they will not receive duplicate benefits.

2.8 Relocation of Remains, Emergency Travel and Emergency Leave

- i. The Fund will reimburse the actual cost of the relocation of remains of qualifying family members who were eligible for resettlement benefits as of the date of their death if the interment takes place outside the duty station area. Staff members may choose any destination for the repatriation of remains. The cost limits for relocating the remains are calculated based on relocating them to the approved resettlement travel destination, as set out in Section 4. To qualify for reimbursement under this provision, relocation of remains must commence within 60 days of the qualifying family member's death.
- ii. The Fund will also provide "Emergency/Bereavement Leave" for the staff member or where provided, their spouses to accompany qualifying family member's remains to the same point of interment or place of death.
- iii. The Fund also provides "Repatriation of Remains" in the event of the death of a staff member.

Section 3: Financial Assistance Upon Separation

3.1 Purpose

In order to assist staff members in establishing themselves and their qualifying family members at a resettlement destination and to offset the costs of moving to a new location, the Fund will provide eligible staff members with a resettlement allowance. Staff members may use the resettlement allowances as they choose and do not need to

¹"Part-time" means an arrangement where the approved working hours for a staff member are less than a standard day or work week. However, this should not be less than 50 percent of the standard full-time working hours.

document their expenditures for the Fund. A **staff member**¹ who is a U.S. taxpayer and receives a tax allowance from the Fund will be paid a tax allowance on the resettlement allowance received.

3.2 Resettlement Allowance

The resettlement allowance comprises a standard flat allowance for staff members and qualifying family members. This allowance shall be reduced by the amount of any installation grant to which the staff member or **spouse**² is entitled from a new employer for themselves and for qualifying family members.

3.2.1 Amount of the Allowance

The resettlement allowance equals one-half the rate of the "Appointment Grant" Staff members will receive the amount in effect at the time that they separate from the Fund. If a qualifying **family member**³ repatriates in advance of the staff member, 50 percent of the allowance will be paid at the time the family member arrives at the resettlement destination, with the balance paid when the staff member resettles. The resettlement allowance will be paid upon submission of sufficient documentation to the HR Center demonstrating actual relocation. For staff whose dependent children repatriate in advance of the staff member and before October 1, 2020, the changes to the resettlement allowance effective October 1, 2020, will apply as follows:

- i. 50 percent of the resettlement allowance will be paid in accordance with the policy in force before October 1, 2020.
- ii. The remaining 50 percent of the resettlement allowance will be paid to the staff member who separated on or after October 1, 2020, in accordance with the new policy and rates that took effect on October 1, 2020.

3.3 Allowance Reduction for Short Service

When resettlement benefits are approved for a staff member who has less than two years of service with the Fund, the staff member will receive one-twenty-fourth of the resettlement allowance for each full month served. Unused annual leave will be counted towards the applicable period of service, up to the qualifying period of two years' service, as if the staff member were using the leave prior to separation.

Section 4: Resettlement Travel

4.1 General

Staff members who separate from the Fund after completing at least two years of continuous eligible service and whose resettlement destination is more than 35 miles from their residence and office are entitled to **resettlement travel**⁴ to the location of their choice, subject to the applicable cost limit.

4.1.1 Cost Limits for Resettlement Travel

- i. Staff Members Who Are Eligible for the Expatriate Allowance as of Their Date of Separation. The cost limit will be the cost of the most direct travel route and shipping from the **staff member**⁵'s duty station to

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²"Spouse" shall have the meaning set out in Chapter 2.02, Section 2.4.1 (Definition of "Spouse").

³"Family Member" means a spouse or a child as set out in Chapter 2.02, Section 2.5 (Appointment Benefits).

⁴"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

⁵"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

either their recognized home country or to the place of recruitment, whichever is greater, with the following exception:

- For staff members who were eligible for the Expatriate Allowance as of their date of separation but then become permanent residents of their **duty station country**¹ before using their resettlement benefits, the cost limit will be limited to the cost of the most direct travel route and shipping from their duty station to the most distant city on the mainland of their duty station country.
- ii. **Staff Members Who Are Not Eligible for the Expatriate Allowance as of the Date of Their Separation.** A staff member who is not eligible to receive the Expatriate Allowance as of the date of separation will be eligible for resettlement travel and shipment from the duty station to a destination within the cost limit of the most direct travel route and shipping from their duty station to either the most distant city on the mainland of their duty station country or the place from which they were recruited (if they were recruited outside the duty station country), whichever is greater.
 - iii. **Cost Limits for Staff who Separate from a Temporary Overseas Assignment.** When staff members separate while on temporary overseas assignments (after having transferred there from their permanent duty station), the travel and shipping cost limits will be calculated separately, as follows:
 - a. the travel cost limit is the cost of the most direct travel route to the staff member's home country via the permanent duty station country; and
 - b. the shipment cost limit is the cost of shipment to the staff member's permanent duty station or to the staff member's home country, whichever is greater.
 - iv. **Cost Limits for Staff who Become Lawful Permanent Residents of the Duty Station Country.** A staff member who was eligible for the Expatriate Allowance at the time of separation but obtained lawful permanent resident status in the duty station country prior to resettlement travel at Fund expense is eligible for resettlement travel and shipment from the duty station to a destination within the cost limits of the most direct travel route and shipment to the most distant city on the mainland of the duty station country.

4.2 Travel Standard

Eligible staff and their family members shall be entitled to resettlement travel at one class above economy with due regard to cost (or first class travel for staff members whose letters of appointment are dated before January 1, 1994), or rail where there is no air connection. When travel is by automobile, the allowance shall be those relating to business travel by automobile as provided in "Standard of Transportation and Routing" except that the maximum cost reimbursed will be within the one class above economy air travel (or first class for staff appointed before January 1, 1994), and the maximum time allowed shall be as defined in the [Travel Rates Table](#).

4.3 Air Travel Arrangements

All tickets for resettlement travel for staff members and their dependents originating within the United States must be issued by the Fund's travel agency. Eligible staff members who resettle from outside the United States may, but are not required to, use the Fund's travel agency, subject to the applicable cost entitlements. Staff who are authorized by HRD to buy tickets on their own must have their itinerary and cost authorized by HRD prior to purchase in order to receive reimbursement.

4.3.1 Downgrading Class of Travel

A staff member may downgrade the cost of the entitled air travel class to apply the balance towards a one-way travel so that any parent, parent-in-law, or **child**² who is not eligible for travel at Fund expense may accompany the staff member. This remaining balance may not be used for any other purpose.

¹"Duty Station Country" means the country where the staff member's duty station is located.

²"Child" shall have the meaning set out in Chapter 2.02, Section 2.5 (Appointment Benefits).

4.4 Travel Days

Staff members, including former staff members, on resettlement travel will receive **travel days**¹ in accordance with "Travel Arrangements"

Section 5: Travel -Related Expenses

5.1 Per Diem Allowance

Staff members and their eligible dependents will receive a per diem (subsistence) allowance for each day of official **resettlement travel**². The payment will be based on the most direct route of travel and will be paid upon receipt of the expense report.

5.1.1 Calculation of Allowance

The U.S. State Department per diem rates are the basis for setting Fund per diem (subsistence) rates. For the day of departure from the duty station, travelers may receive an allowance equal to two-thirds of the subsistence rate for the destination city. Travelers will also receive subsistence allowances

- i. at the rate for the destination city for en route **travel days**³, and
- ii. at the rate for the stopover city where the en route stop actually occurred for stopover days.

5.2 Reimbursement of "In and Out" Expenses

Staff members who are eligible for resettlement travel may claim reimbursement of actual "in and out" expenses (portage, taxis, buses, mileage, parking, etc.) for transportation to and from departure and arrival airports for themselves and their eligible dependents based on receipts, up to the allowable ceiling of \$75. If receipts are not presented, staff members will receive a flat allowance of \$20 each way.

5.3 Authorized Stopovers

Depending on the destination of resettlement travel, staff members and their qualifying family members may be authorized to take one stopover with an overnight stay. A stopover may be granted if the total scheduled elapsed travel time to the final destination, including ground connections, on the most direct route exceeds 12 hours. In this event, staff members will also receive:

- i. reimbursement of actual costs of hotel accommodations up to the specified maximum;
- ii. a subsistence allowance for the stopover city; and
- iii. reimbursement of in-and-out expenses.

5.4 Passport and Visa Expenses

The cost of passport and visa fees will be reimbursed so long as these expenses are itemized on the expense report and receipts provided.

¹"Travel Days" means authorized absence of a staff member from duty for actual, direct travel during working hours in connection with certain Fund policies set out in this Handbook. The Transportation website sets out the authorized travel days from HQ.

²"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

³"Travel Days" means authorized absence of a staff member from duty for actual, direct travel during working hours in connection with certain Fund policies set out in this Handbook. The Transportation website sets out the authorized travel days from HQ.

Section 6: Shipment of Personal and Household Effects

6.1 Shipping Options

The Fund will bear the cost of moving personal and household effects of eligible staff members and their families that were owned by them before separation, including the actual cost of export packing, direct transportation, normal customs clearance from the port of arrival, complete destination services, transit insurance, and storage in transit for up to 90 days. Staff members who are eligible for **resettlement travel**¹ and shipment may elect to receive either:

- i. a surface shipment of their personal and household effects via the Fund's shipping contractor as provided in subparagraph 6.1.1, or
- ii. a lump-sum shipping option and make their own shipping arrangements as provided in subparagraph 6.1.2.

Once the **staff member**² has submitted the shipping form and elected between these options, the election may not be changed.

6.1.1 Surface Shipment via the Fund's Shipping Contractor

- i. If staff members choose to have the Fund make their shipping arrangements, their maximum entitlement will be the cost associated with the shipment of a container as described in the [table maintained by CSF](#). Transport costs (freight) for a container (either 20-ft Single or 40-ft Family) are fixed and borne by the Fund. If the shipment exceeds the entitlement, the staff member will be responsible for the costs incurred in excess of the basic entitlement. If a dual shipment is authorized, the maximum cost entitlement will be based on the higher cost location.
- ii. Normally, only one surface shipment of effects will be transported at Fund expense. However, within the cost limits established for sending the entire shipment in one consignment, and within one year after the date of separation from the Fund, the staff member may choose to have a dual shipment from, or to, two locations.
- iii. The Fund does not cover the shipment or storage of vehicles as part of its resettlement benefits.

6.1.2 Lump-Sum Shipping Option

The amount of the lump-sum shipping option will depend on the staff member's family status and whether the approved resettlement destination is within or outside the **duty station country**³. Eligible staff members may apply for a lump-sum shipping option upon HRD's determination of their eligibility and release of the Travel Authorization authorizing a shipping entitlement but no later than one year after their separation date. After demonstrating actual relocation, the lump-sum shipping option will be paid upon submission of supporting documentation to the HR Center.

6.1.3 Staff Member's Responsibility for Shipping Arrangements

If staff members choose the lump-sum shipping option, they will be responsible for making their own arrangements, including but not limited to:

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³"Duty Station Country" means the country where the staff member's duty station is located.

- i. packing;
- ii. container pick-up transport;
- iii. customs clearance (for international shipments);
- iv. insurance for all shipped items;
- v. delivery or storage at origin or destination.

6.2 Excess Baggage Allowance

A lump-sum excess baggage allowance will be paid to all eligible staff regardless of family size or resettlement destination to enable them to bring personal belongings needed for immediate use. The allowance is equal to \$500 for shipments within the duty station country and \$2,000 for international shipments, based on the average cost of shipping 500 lbs. of personal effects via cargo. U.S. taxpayers will be paid a tax allowance on their excess baggage allowance.

6.2.1 Payment of Excess Baggage Allowance

If staff members elect the lump-sum shipping option, the excess baggage allowance will be added to their lump-sum payment. Staff members who elect to use the Fund's shipping contractor will receive the excess baggage allowance only.

6.3 Resettlement of Household Pets

A portion of the excess baggage allowance may be used to cover transportation costs of a household pet(s). The Fund assumes no responsibility with respect to the resettlement of household pets.

6.3.1 Relocation of Pets

The staff member will be responsible for making all arrangements to ship pets, including shots, health certificate, vaccination, dip, transportation, kennels, and other similar requirements. The Fund's travel agency will not handle these requests. The staff member will also be responsible for contacting the authorities of the resettlement destination country to obtain further information on local regulations. The Fund will not reimburse for quarantines or similar fees associated with the importation or repatriation of the pets.

6.4 Additional Expenses

If the personal and household effects of a staff member who has elected to use the Fund's shipping contractor are in transit from the duty station and are unduly delayed by a strike or emergency, the Director of HRD may authorize reimbursement of reasonable additional expenses that the staff member incurs as a consequence, and that are beyond expenses normally incurred during resettlement, such as extended hotel costs or temporary rental of furniture. Reimbursement may be approved for up to 30 days from the date the resettlement travel commences. In the event the staff member has travelled, and the shipment has not commenced yet, no reimbursement of additional expenses will be approved. In special circumstances, for example, shipments to landlocked countries, and subject to airline restrictions, the Director of HRD may authorize shipment by airfreight provided that for staff members who opt to use the Fund's shipping contractor, the cost of the shipment shall not exceed the theoretical basic shipping entitlement.

6.5 Customs Duties

The Fund will not reimburse any customs duties levied on any item shipped under this policy, as well as pets or automobiles shipped by a staff member.

Section 7: Travel Accident, Baggage and Shipment Insurance

7.1 General

The Fund will provide staff members and qualifying family members with travel insurance coverage against accidental death or injury while traveling at Fund expense "Coverage for Accidental Death or Dismemberment" as well as coverage for the loss or damage of accompanied baggage and for the loss or damage of an unaccompanied shipment, up to specified limits.

7.2 Insurance for Accompanied Baggage

The personal effects accompanying the **staff member**¹ and qualifying family members when undertaking **resettlement travel**² shall be insured under the Fund's regular Personal Effects Insurance Policy ("Loss of or Damage to Personal Effects").

7.3 Insurance for Unaccompanied Shipment

The Fund shall provide insurance when shipping arrangements are made through the Fund's shipping contractor (see paragraph 6.1.1).

Section 8: Limitations on Resettlement Travel and Shipping
8.1 Time Limit for Commencement of Resettlement Travel and Shipment.

Resettlement travel by the **staff member**³ and qualifying family members and shipment of effects must begin within one year from the effective date of the staff member's separation from the Fund or at any time during "Separation Leave with Pay In Lieu of Separation Payment" No exceptions to extend the time limit beyond one year will be permitted. Travel and shipment will be regarded as having commenced if the staff member has departed the **duty station area**⁴ on Fund-paid travel and, for staff who opt to use the Fund's shipping contractor, personal effects have been picked up by the shipping contractor.

8.2 Separate Travel of Family Members

Qualifying family members may take separate **resettlement travel**⁵ up to one year before or after the date of the staff member's separation, within the approved cost limits, provided that a **child**⁶ meets the eligibility criteria set out in subparagraph 2.1.1.

8.2.1 Proration of Shipping Benefits on Behalf of Dependents

A staff member who wishes to arrange for separate shipment on behalf of a resettling dependent who is resettling in advance of the staff member must make an irrevocable choice between the two shipping benefit options at the time the **family member**⁷ resettles. Half of all entitlements, e.g., one 20-foot container or a lump-sum payment of \$7,000, as well as a \$1,000 excess baggage allowance (for international travel) will be allocated to the first dependent(s) relocating ahead of the staff member, and half will be allocated to the staff member upon separation. No further proration will be allowed.

¹"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

²"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

³"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

⁴"Duty Station Area" means an area within a 35-mile radius from the duty station. For the purposes of "Arrangements for Hybrid Work and Other Forms of Telework" only, "Duty Station Area" means the Washington-Baltimore-Arlington Consolidated Metropolitan Area as defined by the US Office of Personnel Management Locality Pay Area Definitions (published at opm.gov).

⁵"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

⁶"Child" shall have the meaning set out in Chapter 2.02, Section 2.5 (Appointment Benefits).

⁷"Family Member" means a spouse or a child as set out in Chapter 2.02, Section 2.5 (Appointment Benefits).

8.3 Ownership of Effects

All personal and household effects shipped at Fund expense must have been owned by the staff member or a family member residing in the staff member's household prior to the departure for the resettlement destination.

Section 9: Application and Required Documents

9.1 General

The provisions of this Chapter apply to **resettlement travel**¹ by staff members and their qualifying family members, as well as shipment of personal and household effects, with the specific authorization of the Fund in connection with separation from the Fund.

9.1.1 Application for Resettlement Benefits

A **staff member**² should address all forms, inquiries, and requests to the HR Center, except where the Chapter specifies otherwise. The application for resettlement benefits shall include a declaration of residence that is consistent with the declaration required under paragraph 9.2.

9.1.2 Expense Reports

Staff members must submit an expense report to FIN upon completion of resettlement travel. The expense report and related documents should be sent to the staff member's last home department for expense report entry and submission. They must attach boarding passes and an e-ticket receipt along with the pre-trip authorization from HRD (if the ticket was not purchased through the Fund's travel agency), an itemized hotel bill (if applicable), and any other required receipts and documentation to the expense report.

9.2 Affirming Resettlement Destination

Except as provided in subparagraph 9.2.2, a staff member who is requesting resettlement benefits shall affirm in writing that they will reside at the requested destination following separation. Unless the payment is for a dependent who is resettling early (see subparagraph 2.1.3), resettlement benefits shall be paid at the time of separation or resettlement, whichever is later.

9.2.1 Intention to Resettle

Normally, the intention to reside at the requested destination will be regarded by the Fund as carried out when the staff member's household and personal effects, if any, are transferred to that destination and the staff member and qualifying family members travel to that destination. However, the Director of HRD may require other supporting evidence when the Director considers this necessary to ensure that the purposes of resettlement benefits as set forth in Section 1 will be fulfilled.

9.2.2 Affirming Acceptance of Combined Resettlement Benefits for Fund/Fund Couples

The Director of HRD will request cross-signatures of both staff members confirming that each is aware of, and concurs with or objects to, the resettlement arrangements approved for the first staff member departing and the implications for the second staff member in regard to their benefits and allowances.

9.3 Procedure for Eligibility Determination

At the time of separation, the Director of HRD shall determine the eligibility of a staff member for resettlement benefits and for the separation grant, in accordance with the provisions of this Chapter, and shall advise the staff member of their entitlements.

¹"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

²"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

9.4 Deduction of Money Owed to the Fund

Any payment to be made by the Fund under this Chapter to, or in respect of, a staff member shall be reduced by any amount owed by the staff member to the Fund as set out in "Repayment on Separation from the Fund"

9.5 Restitution of Undue Payment

Any sum paid by the Fund under this Chapter to which a staff member was not entitled shall be repaid by the staff member. The amount due shall be deducted from any amount due by the Fund to the staff member, other than benefits due under the Staff Retirement Plan or the Voluntary Savings Plan (including the Enhanced Voluntary Savings component of the VSP). In the event the Fund discovers that the separated staff member used fraudulent documents, or misrepresented facts, to obtain the resettlement allowance, the Director of HRD will require the repayment of the resettlement allowance and may impose measures such as forfeiture of eligibility for benefits, e.g., Medical Benefits Plan and/or Group Life Insurance, or suspension of the Fund's contributions towards such benefits for a period as the Director deems appropriate.

Section 10: Coordination of Benefits for Fund/Fund Couples
10.1 General

If both spouses work for the Fund, and both are eligible independently for similar relocation benefits, then their eligibility for relocation benefits will depend on when the spouses separate from the Fund.

10.2 Both Members Resettle Within One Year of Each Other's Date of Separation

If both members of the couple resettle within one year of each other's date of separation, the two staff members and their qualified family members are entitled to combined resettlement benefits as a family unit, subject to special provisions as set out below. Either **staff member**¹ may apply for resettlement benefits, but only one of the spouses will be eligible for resettlement benefits, and the other **spouse**² will be treated as a **family member**³. Qualifying family members will receive their benefits based on the entitlements of the spouse eligible for resettlement benefits.

10.2.1 Special Provisions

In the case of Fund/Fund couples who resettle within one year of each other's date of separation, the following special provisions apply with respect to resettlement benefits:

- i. Application for Resettlement Benefits and Choice of Destination. Either staff member (but not both) may apply for resettlement benefits and select the resettlement destination.
- ii. Reduced Benefits for Short Service. The provisions of paragraph 2.3 will not apply to couples being treated as a family unit unless both staff members have served for less than two years. In that case, the service of the staff member having the longest service will be used as the measuring service for purposes of reducing the benefits.
- iii. Prior Notification of Both Spouses. Resettlement benefits for the first staff member to depart will not be approved until both staff members sign a document confirming that each is aware of the resettlement arrangements approved for the first staff member to depart and the implications for the second staff member's benefits and allowances. The second staff member will be asked to indicate whether they concur with or object to the resettlement arrangements.
- iv. Separation, Divorce, or Termination of Partnership. In special and unusual circumstances, the Director of HRD may authorize payments/benefits deemed appropriate in the individual circumstances, e.g., in case of

¹"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

²"Spouse" shall have the meaning set out in Chapter 2.02, Section 2.4.1 (Definition of "Spouse").

³"Family Member" means a spouse or a child as set out in Chapter 2.02, Section 2.5 (Appointment Benefits).

separation, divorce, or termination of domestic partnership, each of the staff members will be permitted to receive resettlement benefits independently under their own entitlements. However, children who receive resettlement benefits under the entitlements of one spouse will not be eligible to receive the same benefits under the entitlements of the other spouse.

10.2.2 Coordination of Benefits

The combined resettlement benefits of the couple will be coordinated as follows:

- i. Election of Destination. A request for resettlement benefits to a destination may be made through the entitlements of either staff member.
- ii. Combined Entitlements for Resettlement and Shipment Weight Allowances. The entitlements under Sections 3 (Resettlement Allowance), 4 (Resettlement Travel), and 6–7 (Resettlement Shipping) shall be those of one staff member and family, with one receiving benefits as a staff member and the other receiving benefits as a spouse, and their qualifying family members receiving benefits based on the entitlements of either staff member, but not both.
- iii. The limitation in paragraph 2.3 shall not be applied unless it pertains to both, in which case it shall be applied on the basis of the service of the staff member having the longer service. The reduction in paragraph 2.7 shall be applied in respect of either staff member or any family member for whom an installation allowance is paid by the new employer(s).
- iv. Cost Limits for Resettlement Travel and Shipment. The cost limits for travel and shipment for Fund/Fund couples will be based on the entitlements of the staff member in whose country the family resettles. If the family resettles in a third country, the cost limits will be based on the entitlements of the staff member whose entitlements are the larger.
- v. Travel Accident Insurance. Both staff members shall be insured as staff members under paragraph 7.1, unless coverage as a staff member and spouse would be higher, in which case the latter coverage shall apply. Insurance of effects shall be that applicable for one staff member with family.

10.3 Spouses Resettle One or More Years After the Other's Date of Separation

In this case, full resettlement benefits will be provided to each staff member of the Fund/Fund couple. Children who receive resettlement benefits under the entitlements of one spouse will not receive the same benefits under the entitlements of the other spouse.

Section 11: Responsibilities of Staff Members

11.1 Responsibilities of Staff Members

The **staff member**¹ is responsible for:

- i. providing current and accurate information to the Fund for the purpose of determining their eligibility for the benefits under this Chapter;
- ii. notifying HRD promptly of any change in circumstances that might affect the staff member and their family members' eligibility, and promptly repaying any overpayments due to the Fund;
- iii. ensuring that **resettlement travel**² is conducted in accordance with this Chapter; and
- iv. submitting the documents in a timely manner, as required by Section 9.

¹"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

²"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

Section 12: Separation Grant

12.1 Eligibility

A **staff member**¹ who retires or resigns from the Fund after five years or more of continuous service on a letter of appointment dated before July 1, 2011, will be eligible for the separation grant. Periods of leave without pay in the interest of the Fund, but not leave without pay for personal reasons, will count towards determining a staff member's eligibility for the separation grant.

12.2 Qualifying Service for Determining the Amount of the Grant

- i. Part-time service periods will be recalculated on a prorated basis to establish the equivalent full-time service periods for the purpose of calculating the amount of the grant, e.g., two years at 50 percent **part-time**² is equivalent to one year full-time.
- ii. Periods of "Separation Leave with Pay In Lieu of Separation Payment" will not count towards calculating the amount of the grant. Periods of service accrued before a break in service from the Fund will also not count towards calculating the amount of the grant.
- iii. If leave without pay, whether or not in the interest of the Fund, is taken for periods exceeding 30 calendar days, the entire leave period shall be excluded from the calculation of the amount of the separation grant. A period of such leave for 30 days or less shall not affect the calculation of the amount of the separation grant.

12.3 Amount of the Grant

12.3.1 Base for Calculating the Grant

The separation grant will be calculated based on the staff member's final net salary³, although the amount of the staff member's entitlement will also depend on whether the resettlement location is within or outside the last duty country. The full separation grant will be equal to two weeks' net salary for each full year of qualifying service, as set out in paragraph 12.2 above, up to the maximum of 52 weeks' net salary for 26 years of qualifying service. Partial years of qualifying service will be paid at the rate of one-twelfth of two weeks' net salary for each additional full month served.

12.3.2 Effect of Resettlement Location

The amount of the staff member's entitlement will depend on whether the staff member resettles within or outside the last **duty station country**⁴, as follows:

- i. Resettlement in the Duty Station Country: An eligible staff member who resettles in the last duty station country, or remains at the last duty station after separation, will be entitled to two-thirds of the separation grant rate as set out in subparagraph 12.3.1 above. The staff member will receive this entitlement upon separating from the Fund.

¹"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

²"Part-time" means an arrangement where the approved working hours for a staff member are less than a standard day or work week. However, this should not be less than 50 percent of the standard full-time working hours.

³The most recent annual salary supplements paid to Directors designated as Counselors of the Fund and to Deputy Directors designated as Senior Deputy Directors shall be included in the calculation of the separation grant amount, assuming they are eligible for the separation grant.

⁴"Duty Station Country" means the country where the staff member's duty station is located.

- ii. **Resettlement Outside the Last Duty Station Country:** An eligible staff member who resettles and establishes residence outside the last duty station country after separation is entitled to the full amount of the separation grant rate as set out in subparagraph 12.3.1 above. Subject to paragraph 12.3.4, the staff member will be paid two-thirds of the separation grant amount upon separating from the Fund. The staff member will be paid the remaining one-third of the grant amount upon fulfilling the requirements set out in paragraph 12.4. The residence a staff member may establish outside the duty station country need not be the staff member's only residence.

12.3.3 Outstanding Debt to the Fund

An advance payment of the separation grant will not be made to staff members who have a debt outstanding to the Fund, unless the debt can be met in full by the reduction of the other payments by the Fund to which the employee will be entitled upon separation. The other payments referred to will not include amounts due to the employee under the Staff Retirement Plan except with the prior written authorization of the staff member.

12.4 Requirements to Claim the Remaining One-Third of the Grant for Resettlement Outside the Last Duty Station Country

In order to claim the remaining one-third of the separation grant, a staff member must resettle outside the last duty station country within one year of separation and provide the necessary documentation to the Fund to substantiate this resettlement. In order to claim the remaining one-third of the separation grant, staff who (i) resign from the staff to accept a position on the Executive Board as set out under Chapter 10.01, Section 6.3 and who are not reappointed to the staff at the conclusion of such service; or (ii) who accept a contractual appointment without a break in service after their staff appointment and who are not reappointed to a position at the Fund at the conclusion of such service must resettle outside the last duty station country within one year of their separation from the Executive Board or their separation following the end of their contractual appointment, respectively.

12.4.1 Application for Remaining One-Third of the Separation Grant

- i. **Initial Application for Remaining One-Third of the Separation Grant:** A staff member who plans to resettle outside their last duty station country should normally apply for the remaining one-third of the separation grant at least two weeks prior to their separation date and declare in writing the intended country of residence. HRD will advise the staff member whether the planned resettlement, if it occurs as planned, qualifies for the remaining one-third of the grant.
- ii. **Subsequent Payment Application and Substantiation:** The Fund will withhold qualified payment of the remaining one-third of the separation grant until the staff member has submitted the **resettlement travel**¹ claim and a payment application. This latter application must be submitted no earlier than six months, and no later than 18 months after the date of resettlement travel or separation/retirement date, whichever is later, and it must be supported by documentation to substantiate that the staff member has resettled and established residence outside the last duty station country. In this regard, the following documents must be provided:
 - a. a notarized statement or other corroboration indicating that the staff member has been residing outside the last duty station country for a minimum period of six months after the staff member's travel is completed; and
 - b. a combination of documents sufficient to demonstrate that the staff member established residence in the resettlement destination, which may include:
 - 1. One or more of the following documents from the last duty station country may be used to demonstrate that the staff member left the duty station country:

¹"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.

- shipment of household goods consistent with the staff member's stated intentions to the resettlement destination,
 - evidence of the sale of residence,
 - evidence of termination of a lease,
 - other proof specific to the duty station country.
2. One or more of the following documents from the resettlement destination if they indicate the staff member's name may be used to demonstrate that the staff member has established a principal residence in the resettlement destination:
- residence lease of one year or more,
 - a residential property title,
 - utility bills,
 - automobile registration or lease,
 - voter registration,
 - registration in the national health scheme,
 - proof of employment,
 - school enrollment of children,
 - other proof specific to the jurisdiction where the staff member has resettled.
- iii. Review of Application. The application for the remaining one-third of the separation grant and supporting documents will be reviewed by HRD. If the evidence is considered sufficient to support the staff member's certification of having resettled outside of the last duty station country, the remaining one-third of the separation grant will be authorized for payment. Such payment will be made no earlier than six months and no later than 18 months after the date of resettlement travel or separation, whichever is later. The Director of HRD may refuse to authorize payment of the remaining one-third of the separation grant if, in their judgment, bona fide resettlement outside the last duty station country has not taken place.
- iv. Inaccurate Information. In the event the Fund discovers that the separated staff member used fraudulent documents, or misrepresented facts, to obtain the remaining one-third of the separation grant, the Director of HRD will require the repayment of the one-third of the separation grant and may impose measures such as forfeiture of eligibility for post-separation benefits, e.g., Medical Benefit Plan and/or Group Life Insurance Plan, or suspend the Fund's contributions toward such benefits for a period as the Director deems appropriate.
- v. Documentation Requirements. Subsections (i) through (iv) shall apply to all staff members who are eligible for the separation grant, including staff members who are eligible for resettlement benefits.

12.5 Fund/Fund Couples

A **spouse**¹ in a Fund/Fund couple who has resettled to a destination outside the last duty station under the other spouse's entitlements after their own eligibility for resettlement benefits has lapsed shall not be entitled to the remaining one-third of the separation grant.

12.6 Payment in the Event of Staff Member's Death

If an eligible staff member dies in the Fund's service, payment of the separation grant will be made to the beneficiary or beneficiaries whom the staff member has designated on the appropriate Fund designation forms. The amount of the separation grant paid (either the full rate or two-thirds of the full rate) will depend upon certain factors, as set out in subparagraph 12.6.1.

¹"Spouse" shall have the meaning set out in Chapter 2.02, Section 2.4.1 (Definition of "Spouse").

12.6.1 Payment of Separation Grant in the Event of Death

- i. **Family Resettles Outside the Last Duty Station Country.** If the deceased staff member's spouse and dependents who are eligible for resettlement benefits resettle outside the last duty station country, the separation grant will be paid at the full rate.
- ii. **Family Resettles Within the Last Duty Station Country.** If the deceased staff member's spouse and dependents who are eligible for resettlement benefits resettle within the last duty station country, the separation grant will be paid at two-thirds of the full rate.
- iii. **Beneficiaries not Eligible for Resettlement Benefits.** If the deceased staff member has no spouse or dependents eligible for resettlement benefits, the separation grant will be paid to the beneficiary(ies) at the full rate if the beneficiary resides outside the staff member's last duty station country, and at two-thirds of the full rate if the beneficiary resides within the staff member's last duty station country. If no beneficiary is designated or if the amount is payable to the deceased staff member's estate, the separation grant will be paid at two-thirds of the full rate.

12.7 Income Tax Allowance

The Fund will pay a tax allowance in respect of a separation grant only if the staff member received tax allowance from the Fund in respect of their Fund salary at the last duty station. In the event that the former staff member qualifies for the remaining one-third of the separation grant and this remaining payment occurs in a tax year later than the date of the staff member's separation from the Fund, the effective tax rate used in the calculation of the tax allowance will be the average rate used when calculating the last tax allowance on net salary, excluding any lump-sum payments.

12.8 Estate Tax

The Fund will not be responsible for the reimbursement of any estate, inheritance, or other non-income tax that may be levied on the payment of the separation grant to either the estate or the beneficiary(ies) of the deceased.

Section 13: Administration**13.1 Director of HRD**

The Director of HRD shall be responsible for the administration of this Chapter, subject to paragraph 13.2 below, and for determining eligibility for the benefits provided in this Chapter. In special and unusual circumstances not specifically covered by this Chapter, the Director of HRD may authorize a payment not otherwise authorized by this Chapter, equivalent to partial or full resettlement benefits, when in the Director's judgment this will carry out the purpose of the policy as set forth in this Chapter.

13.2 Director of FIN

In accordance with the certification of the Director of HRD, the Director of FIN shall be responsible for payment of any benefits under this Chapter, including the review of claims for payments of benefits under this Chapter, the authority to request information from staff members to justify their claims for expenses, and the authority to offset benefits entitlements against any amount owed by the **staff member**¹ to the Fund or recover monies or expenses paid if proper documentation or justification is not submitted.

¹"Staff member" means a full-time or part-time employee of the Fund who has been appointed to either a regular (i.e., open-ended) or term position and whose letter of appointment indicates that they are a "staff member of the Fund."

13.3 Director of CSF

The Director of CSF shall be responsible for the arrangements for the **resettlement travel**¹, shipment, Fund-provided insurance and storage benefits set out in this Chapter.

¹*"Resettlement Travel" means travel of a separated staff member, and their eligible family members, from the duty station country to a resettlement destination.*