

9 Essential Questions

Every Expat Should Ask



When we think of living abroad, we instantly conjure up images of white sandy beaches, turquoise seas, friendly locals and a leisurely quality of life. That is, until we're two days into our first relocation, surrounded by boxes, with no power, no internet, and no help in sight. By day four, the bloom has gone off this particular rose, and by day seven, we realize

that we were possibly just a little naive in thinking that four bedrooms, a balcony and guaranteed sunshine were really all we needed to find our bliss. So for the anyone considering relocating, here's our 9 Essential Questions Every Potential Expat Should Ask guide. And yes, the same rules apply for domestic relocations too...

Why Do I Need This Guide?

For those of you who are not familiar with the history of relocation policy and practice, the current model was developed in the 1950's for relocating US servicemen around the world in the wake of WWII.

In those days, families were viewed as a unit to be moved, and services, support and a ready made community was already in place in the host location.

Nowadays, while the diversity of assignment location hasn't changed, the family being relocated has. The majority of partners are professionally educated and have a career in their home country,

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I. WHY AM I GOING?

The million dollar question. In the case of corporate relocation, quite literally, because the average cost of an international assignment for the employer falls between \$500,00 and a cool million. That's a lot of investment, and understandably, companies like to



make sure that their investment is worthwhile. So before you start thinking of your move as a way to escape the mother-in-law, the taxman or the horrendous weather, pause for a moment and consider whether you are doing it for the right reasons, or whether you are viewing it as an extended vacation.

Problems that exist in your home country have a nasty habit of following you to your new location, so if you are a person who already sees your geographic glass as half empty, bear in mind that you may well be replacing your old problems with a whole set of new ones.

Good reasons to move include career development (see question 9 for more on that), to experience the world, to explore other cultures and to meet new people. Less good ones include financial benefits (they pay hardship allowances for a reason - the clue is in the name..), because you like the idea of a year long vacation or because you think expat life is all cocktails and exotic family holidays.. And if (like me) you think moving abroad will allow you to spend more time together as a family, pause for a second and remember that the chances of your partner coming home from work any earlier in the new location are about as likely as me giving up chocolate.. It's not going to happen.



2. WHERE AM I GOING?

The standard ways of finding out destination information – travel guides, websites and maps –

tell you very little of what you need to know when relocating. Visiting a country for a short period is very, very different to living and working there, and it's the challenge of day to day living that causes many assignments to end early.

To understand whether your new location is a good fit for you and your family, you need to do two things. Firstly, assess how your time is spent currently, including work, school, commuting travel, after school activities, sports, socializing etc. Using resources specific to long term living rather than short term visits, assess how much change you would experience, what benefits and disadvantages your new location has, and decide whether or not this is really the move for you.

This might be anything from a lack of sunshine / open space / daylight hours / professional theatre to different education systems, religious practices or high crime rates. There is a whole world out there, and it's better to keep your options open for a more appropriate assignment than be forced to terminate one early.

Ask your HR department about global information that the company purchases – resources like Living Abroad, Expat Arrivals, the Not for Tourists guides and the Lonely Planet guides will give you much of the information you need, and online blog registries and expatriate forums have the real life experience. Consider joining a network like Internations to meet locals and expats from your potential host location.

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blended families are more common, there are increasing numbers of same sex couples. In short, the needs of relocating families today have much less in common with those of 60 years ago.

Relocation policy and management has difficulty keeping up - for one thing, how do you ensure parity of provision across a global corporation when everyone has very different priorities? And how on earth can these individual needs be assessed effectively when the HR department is 4000 miles away and has no international location experience.

That's where this guide comes in. It encourages you to take ownership of the relocation process, and instead of assuming that your HR contact can read your mind or predict your future, take some time to think about what your priorities are. Relocation is a literally a life changing process, and you need to be an active, empowered partner in the process.

We can't give you every answer, or predict the challenges you will face, but what we can do is give you some questions to ask yourself, and start making you think about life, the universe, and where exactly you will fit in..

3. HOW LONG WILL I BE GOING FOR?

Notice that I didn't ask how long your was contract was for? Ten years and 5 relocations ago, we were offered a 1 year temporary assignment to Kenya. I have yet to return home, and all of our wedding photographs, birth certificates, photographs of our children as babies and furniture are still in a house in Wales.

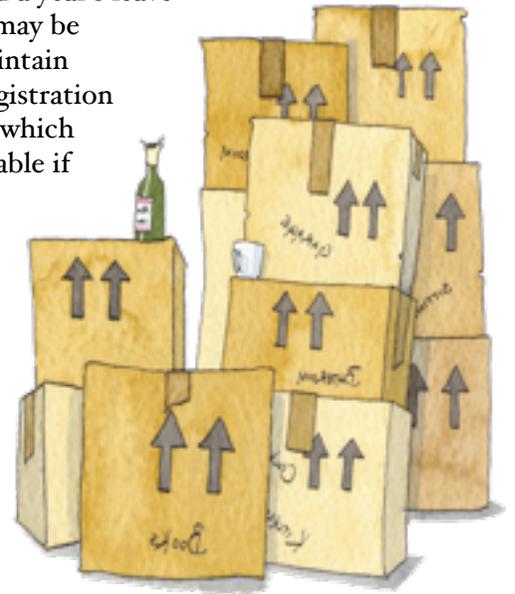
Contracts get extended, new transfers are offered, and if you are taking short term assignments, often all your belongings are not included in the relocation policy.

More importantly, you need to have a clear understanding of how long all members of the family are willing and able to participate a globally mobile life.

The long term issues surrounding schooling mean that your children may not have the required qualifications to attend the school of their choice (although colleges and universities are becoming much more flexible in terms of acceptable international admission criteria) or they may now be

liable for higher 'international' tuition fees as you have lived outside your home country for too long to qualify for local fees.

The accompanying partner may have negotiated a year's leave of absence, or may be required to maintain professional registration status, both of which become vulnerable if an assignment is extended.



4. WHAT DOES THE PACKAGE INCLUDE?

There are various types of relocation policies, including local, local plus and

international, all of which give different levels of pay and benefits dependent on location. And while some will seem very generous in terms of base salary and hardship allowances, once on assignment you can quickly discover that the money is eaten up in unexpected ways.

If you have the information from the previous questions, you will have a better idea of what your new lifestyle will cost, and whether or not components that you consider essential are reflected in the assignment offer.

Key areas to look for are not just base salary, but frequently

reviewed goods and services supplements (useful in less stable countries where the price of goods and exchange rates can fluctuate wildly), health insurance coverage, childcare and school funding, whether you will be paid in your home or host currency, travel allowances, emergency evacuation policies, and repatriation assistance.

Talking to other expats will give you the best understanding of the real cost of living, which brings us neatly to the next question ..



WHAT THE EXPERTS SAY:

"Some companies now include job search support and transition or education allowances for accompanying partners in their relocation packages in addition to the more common offerings of language and cultural training. Ask what's available for your partner as additional support may not be offered unless you ask."

"The container is unpacked, and everyone else has gone off to work or school. The accompanying partner is left to create a new life and often receives little ongoing support to do so. Starting before you leave and continuing through the early months of your assignment, working with a coach will empower you to create a unique expat experience that fits with your personal values and objectives."

EVELYN SIMPSON, THESMARTEXPAT.COM

5. WHAT SUPPORT IS AVAILABLE ?

If you answered the first three questions, you already have an idea of what support you'll need – so here's where you have a clear conversation with HR about what support services are in place to meet those needs.

Many packages seem lavish to the casual observer, but when you scratch the surface, the services included are not always right for your family needs.

Take schools, for instance. While the local schools may be excellent, if you are on a 2-3 year contract with a high school age child, you need a curriculum that accepted by their target college rather than a host location one.

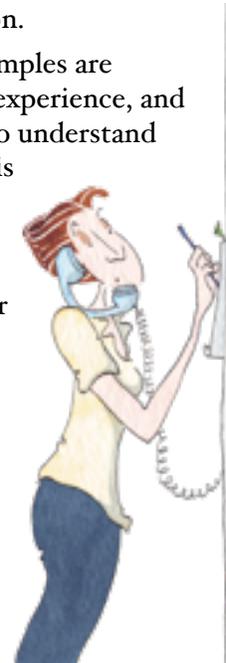
If the relocation package doesn't include funding for private schooling or increased college fees, your salary has effectively been reduced by anything up to \$50,000 per child, per year.

Increasing numbers of assignments are to developing markets – India, China and Africa – all of which need considerable amounts of cultural orientation and language training.

Does the package include enough for you to be able to function effectively and meet your personal goals outside the home or workplace? Shopping, medical visits, dealing with bureaucracy – all are a very real

part of the transition, and all involve interpersonal communication.

These examples are gleaned from experience, and the best way to understand what support is needed is to see it firsthand. Hence number 6.





Trisha Carter is an Intercultural Specialist, helping people from different cultures work effectively together. As an Organisational Psychologist she coaches, trains and counsels individuals, teams and families to work well and live well in another culture and cope with the challenges of communicating, managing people and adapting. Here's what she had to say:

"If you are moving anywhere you can bet there will be aspects of the local culture that will be different to where you have come from. This will be true if you are moving from one area of your home country to another (state to state, city to rural) and even more so if you need to show your passport and cross country borders.

You will need to increase your cultural intelligence. That means gathering information and learning new things but it's also more than just knowledge; it's also about your motivation, about being willing to change and not judge, it's about operating in different ways in different situations and sometimes just taking the courage to step out and do something differently."

WHAT THE EXPERTS SAY:

"A preview trip is essential for the whole family, not just the adults. After all, this involves and impacts everyone."

There is nothing like going first hand and having a relocation consultant to brief you on the area, take you around the city, visit the various communities, interview with schools and talk to other expats that are already living there. Take the morning commute, experience the daily life as much as possible. Visit some homes to see if what is offered is in your budget. Videos, books and Google are wonderful resources and tools, but experiencing everything first hand will give you a better idea of what life will be like, if it will work for you and your family, what are the pros and cons, the changes you will experience, and the overall effect on your family.

CLIVIA BETELLI BASKIN, PLACE₂PLACE RELOCATION

WHAT IS DEFINING MOVES?



Defining Moves is the work of Rachel Yates (a self titled "Trailing Spouse,") who designs and creates resources to improve the relocation experience, from the moment you start considering a move, through the actual transfer, your adaptation and orientation to your new environments, and through your eventual repatriation home.

6. DO WE GET A FAMILY PRE-VISIT?

In my mind, the pre-visit is vital to a successful relocation – there is no substitute for seeing firsthand the challenges that you all will be facing.

Throughout the assignment process, your life transition is facilitated by people whom you have never met, and who are defining your needs for you. The pre-visit is your chance to see what they got right, and what they have wrong.

The biggest mistake people make is to use the pre-visit purely to find housing. This is wrong for two reasons:

- it means you agreed to the assignment based on a very small amount of information
- the time is better spent identifying the challenges you face, not choosing floor plans.

So what should you be doing?

Sadly, not staying in the hotel enjoying room service, or visiting the local tourist sights. (Go to the Defining Moves website and look under the ‘Tools & Tasklists’ tab to find our Preview Visit Checklist.)

Your goal is to recreate daily life, in all its glory, using the information that you put together in the previous steps. Look at neighborhoods, visit schools, experience traffic and commute times, do some grocery shopping, and most of all, talk to other expat residents.

Listen carefully to what they are telling you about the good, the bad and the plain ugly of your new home. Not all of their concerns will be problems for you, but you can count complaints about the weather, issues with utilities, security, traffic and schools being pretty universal.

Once everyone has given you the low down and dirty, discuss the concerns of your own family. The work environment will be more familiar and (usually) more supportive, whereas everyone outside of work is flying solo, and your package needs to acknowledge and make allowances for that.

With “62% of all refusals to accept an international posting .. family related” and “34% of expatriates return from assignment prematurely because of family concerns”, this pre-visit is a time for the whole family to identify the potential pitfalls and possible ‘deal breakers’ while you still have time and negotiation on your side.



HOW DOES DEFINING MOVES HELP ME?

Our goal is to provide the information, resources, task lists and recommendations to help you through the relocation process. Having been through it ourselves, we know that the secret to success is knowing what you want and need, learning what is available, and having the resources and support to put your plan into action.



7. WHAT PROVISION IS THERE FOR MY PARTNER?

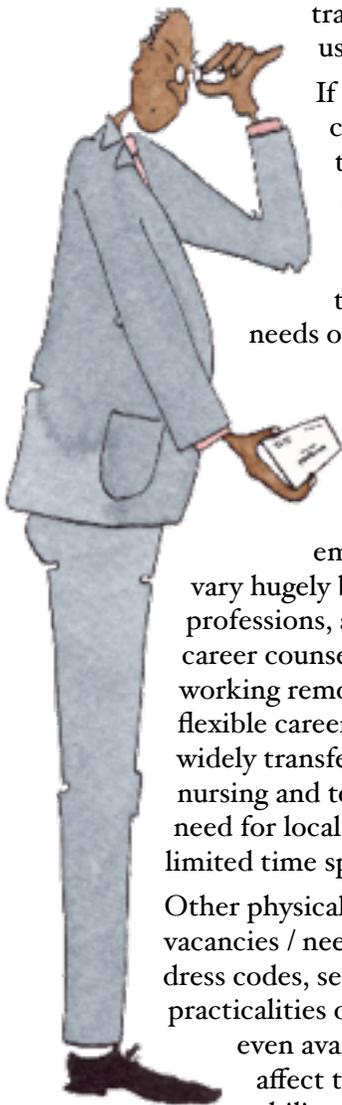
Relocation policies are increasingly aware of the need to keep all members of the family happy, especially when the majority of early repatriations are due to family concerns. This is reflected in many assignment packages, which include career assistance for the spouse (resume preparation, employment authorization documentation, visa assistance etc.),

cultural orientation training, language training, or a lump sum to be used in any way you prefer.

If you have taken the time to create your family 5 year timeline, your expectations and goals should be clear, and you can identify whether the package (and the length of the assignment) meets the needs of the accompanying partner.

The ability of the partner to work will depend on many things, not all of which you might expect. Visas, work permits and employment authorization will vary hugely between locations and professions, and it may be wise to get career counseling explore the option of working remotely or creating a more flexible career structure. Even those with widely transferable professions such as nursing and teaching are restricted by the need for local re-certification within the limited time span of the assignment.

Other physical factors such as local vacancies / needs, restrictions (e.g. curfews, dress codes, security issues, laws etc.) the practicalities of sustaining a family life, or even availability of childcare will affect the accompanying partners ability not just to find work, but to maintain an career long term.



Some questions to consider include:

- **Is there organizational recognition for same-sex partnerships, and does the host location have a similar policy?**
- **Is there orientation and location support for the partner, or are they just expected to 'get on with it'?**
- **Is there an established expat group in place to provide host country support?**
- **Who is expected to establish the essentials - housing, utilities etc? How much time and management does this typically take?**
- **Will you be legally able to work in your host country, what national and local documentation is required, and how long will the application process take?**
- **Will you be required to undertake local re-certification, and how long will the process take?**
- **How much travel will the assignment require, and will that affect the accompanying partner's ability to work?**
- **Is the accompanying partner's career appropriate for short term employment, and what would happen if the assignment duration changed?**
- **Is remote working a possibility, or should you consider career counseling to explore other options?**
- **Are there any local cultural or legal barriers to your employment?**

“Working in your host country can be a wonderful experience, personally and professionally, but don’t assume that what you know is transferable.”

Everything that worked so well to land you your current position may no longer apply. It’s never too early to gather information and build new networks. Include local contacts to help bridge cultures. Be creative. Create a plan, and a contingency plan, or two. Ask yourself the hard questions. “Who am I? What do I want? How can I contribute?” Consider your options, their advantages and disadvantages. Make informed choices, take charge of your life, and be persistent in pursuing your goals.

JENNIFER BRADLEY, CAREEROPTIONSCOACH.COM

8. WHAT PROVISION IS THERE FOR MY CHILDREN?

The questions that apply to the accompanying partner also have relevance for any children in the family. All the standard questions for any school about curriculum, student-teacher ratios, test scores and demographics apply, but there are additional factors to consider to ensure a consistent and coherent academic pathway.



For short term assignments and younger children there is more flexibility in terms of practical schooling options, but the older the children, there is a greater need for advance planning for college applications, residency requirements, academic language and funding. As a rule of thumb, most expats I know have planned current schooling well, but the issues of college education have been forgotten. We are unfamiliar with the admissions process and

requirements, fail to understand the importance of standardized tests, and underestimate the complexity of the fee structure.

While colleges are increasingly accepting a wide range of academic evidence for entry, there is less flexibility when it comes to funding. Short term assignments often mean that you no longer qualify for resident rates, whether national or state, regardless of your citizenship. If you have high school age children, consider the long term impact of your school and assignment choices - if you thought private school was expensive, just wait until you see the college 'international student' rates...



WHAT PROVISION IS THERE FOR MY CHILDREN? (CONT)

- How long is the assignment, and what if it gets extended or you move to local payroll? While private schooling is the most flexible in terms of admission and curriculum, the long term expense can be prohibitive.
- Does the host location have appropriate available schooling, or will boarding school need to be considered now or in the future? Is this something you and your children are happy to consider?
- Does your child have any social, emotional or learning issues that will need special consideration? Are these needs able and likely to be met in the new location, or will you need additional resources?
- Does the new location allow for transfers between schools, or is there a limited choice? Is homeschooling supported where there are gaps in curriculum provision?
- What are the demographics of the school? Will the range of languages spoken be an advantage or a barrier to effective teaching and learning?
- Does the policy absorb the impact of international college fees, and what if we transfer during the college years?
- If your children are college age and would normally have spent summers living at home, does the package include a flight to your new location for them once per year?
- What happens when my child reaches legal adulthood? Will they be allowed to remain in the country as dependents, or will they have to apply for an independent visa?

WHAT ABOUT REPATRIATION?

Global relocation service providers and the corporations who use them are becoming increasingly aware of the problems facing repatriation.

According to Brookfield's 2008 Global Trends survey, one in two employees returning to their home country leave their employer within 2 years of repatriating. They don't discuss whether the return marked the end of the assignment or whether it was an early termination, but whatever the circumstances, it does seem to indicate that there is a breakdown in communication and career satisfaction somewhere in that period.

There are two key elements to discuss when negotiating assignment contracts with reference to the exit plan. These include

a. What if we want to come home early?

There are many circumstances which require early termination of assignment from the employee perspective - ill health, security concerns, schooling and childcare issues and the failure of the family to settle being some of them.



However, many companies are including a 'clawback' component to assignment contracts, which allows them to reclaim (usually at cost) expenses incurred in transferring you, in some cases both to and from your assignment location.

It is vital before you accept any contract that you understand what your liabilities are in the event of voluntary repatriation - you may discover that the costs are punitive.

Even if the company includes a repatriation clause that funds your return, it may have no obligation to find a new role within the company, to provide you with a reference or any additional support.

What if the company ends the assignment early?

Provided there have been no extenuating circumstances (i.e. redundancy, termination of employment), the costs of repatriation are usually absorbed by the transferring corporation. For the returning employee, however, their former position will have been filled, and there may be no appropriate role for them to return to. Establish the protocol for this scenario - will you return to equal pay and benefits, or will you be forced to apply for roles and renegotiate contracts. Will you return to your former location, is there repatriation assistance and reimbursement of expenses while you re-establish life?

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TRISHA CARTER



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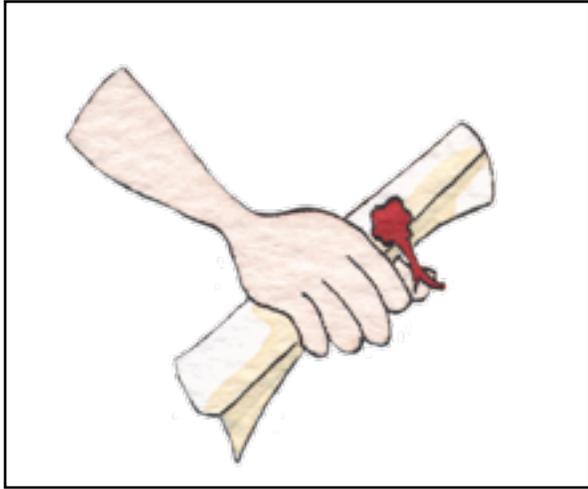
EVELYN SIMPSON



Evelyn Simpson helps accompanying partners to overcome the identity crisis of an international move so they can create fulfilling lives in their new countries.

www.thesmartexpat.com.

So What Now?



We've started you off - now it's up to you to find the answers. The good news is that you are not alone in this - corporations, the military, diplomatic services and independent operators transfer

hundreds of thousands of people every year, so all the information you need is already out there. The Defining Moves website is a great place to start, so here are our recommended next steps:

Check out our Relocation Checklist. It's a comprehensive list of the essential parts of any relocation, complete with links to more information.

Start planning your own move with our Lifeline Relocation Planner - an integrated timeline that maps each part of your transition from your own unique family perspective.

Get help with our links to the best websites, resources and service providers in the Expat Life section, and if you need a few examples of how not to do it, check out the real life expat stories in the Defining Moves blog..

www.expatsfocus.com

This site deserves a mention simply for it's free guide to moving abroad, which covers many of the practical, social and emotional aspects of international relocation. It also has a wide range of articles, and free country guides for the more frequent expat postings. My personal favorite.

www.expatarrivals.com

"Local info for global expats". A broad range of articles and independent expat guides make this one of the best sites out there. An extra 10 points to anyone who manages to find anything written by me..

www.expatwomen.com

The definitive website for blog listings, advice a guidance for the female expatriate. It's currently taking a well-earned break and not accepting new blog and article submissions, but don't be fooled - the range of resources already there are second to none.

www.internations.org/

"Get to know like minded expats in your city" An excellent way to meet people from your host location before you leave and other expats once you arrive. Very welcoming.

www.expatexchange.com

Once you get past the irritating layout, it has a great range of articles if you are willing to search, and a long list of expat forums for you to browse through.

www.transitionsabroad.com

Primarily for the independent traveller, this site has the best index of expatriate websites out there. It also list them by country, which will save you hours of Googling..

www.easyexpat.com

Along with it's sister site (www.blogexpat.com) this provides information about living and working around the globe. It has a huge range of blogs listed, and has wonderful expert columnists..

www.expatbookshop.com

The only bookstore dedicated to books by expats, for expats. It features a wide range of genres and authors, and some of the most respected experts in the field of family global transition.

www.Facebook.com

No laughing... While for those of us with teenagers, Facebook is a constant source of parenting dilemmas, for finding a new network, it is second to none. Try searching for your location and expats, and see how quickly you find a new group.

www.Twitter.com

Yep, you knew it was coming.. Twitter is one of the quickest, simplest ways to connect with a like minded people.

www.hootsuite.com

Because Twitter and Facebook can take over your lives, but Hootsuite is there to provide some gentle boundaries... Think of it as your social media chaperone.

RESOURCES