

Case Study UK Inbound Temporary Assignment

Client	
Scope:	<p>Director (Andre), his wife (Annette) and three children moving from Paris to Watford.</p> <p>Assignment Offered: May</p> <p>Start of Assignment: September</p> <p>Length of Assignment: not specified</p> <p>Children: girl (Céline) age 4: bi-lingual School (interest: Ballet, Art) boy (Bernard) age 8: French School (interest: Judo, Piano) boy (John) age 14: French School (interest: Judo, Piano)</p> <p>Walking distance to tube for wife Annette</p> <p>Walking distance or max 20 min on transport for children/schools</p> <p>Commuting by car or transport for employee Andre: max 45 minutes</p> <p>Property requirements: 5 bedroom house, 3 bathrooms, basement, parking permit, garden</p> <p>Rental Allowance provided by Client - assumed Relo Policy Level 1, position 16</p> <p>Andre has lived in S-America, Asia and S-Africa (it is unclear if family did too). He is very busy and will have limited visits, most likely Annette will liaise with HCR.</p> <p>Annette's English is described as poor.</p> <p>Family has a grand piano (sentimental value, high cost and in possession for some time)</p>
Critical:	<p>Asthma: One of the boys has just been diagnosed; Annette would like to be immediately in contact with consultant to continue medical check ups.</p>
Country:	UK inbound from France
Services:	<p>Core:</p> <p>Bank account opening, for employee Andre and a separate account for wife Annette – prior to arrival</p> <p>Home Search (accompanied)</p> <p>School Search</p> <p>Removal of Household Goods: upon repatriation</p> <p>Optional: Pre-move visit (Look See), Education Advice (critical school age of older boy), Extra days viewing (Andre has limited time to visit), Visa/Work Permit requirements, Lease Checking and Negotiations, Tenancy Management, Welcome Pack, Area Guide, Grocery Pack, Language Training, Cross Cultural Training, Check In, Driver Familiarisation, Settling In, Check out, Tenancy termination/negotiations of damages</p>



Touch point	<p>Single point of coordination (wherever possible a French Speaker)</p> <ul style="list-style-type: none"> - one in-house Move Adviser - one Local Area Consultant (PA)
Problematic/Risk:	<p>Asthma – Health needs to be immediately addressed, if family believes there is no adequate medical treatment in the UK, they might refuse this assignment.</p> <p>Home Search – decision might be delayed if Andre is unable to travel with Annette (as per Relo Policy it appears that only one visit is authorised – but clarification will need to be obtained from Client)</p> <p>School for Céline (4): depending on the length of the assignment in the UK & depending on plans for subsequent assignment/ repatriation, the choice of a bilingual school might have to be addressed. The Ecole Primaire ‘Andre Malraux’ would be a good option. Space is currently available</p> <p>School for Bernard (8): Bernard could still join the Andre Malraux’ school, together with his sister. He later will need to change to the Lycee. Space is currently available.</p> <p>School for John (14): The Lycee would be the first option and we checked into the waitlist situation. Currently there are enough spaces, however they usually fill fast in May/June. A school visit and choice should be arranged quickly. There are no other French Schools in London catering for John’s age. Some French students who are unable to join the Lycee join the ICL, an IB school.</p> <p>Annette speaks poor English – Settling in will be more difficult, need to find French networking group.</p> <p>Piano – At this stage it is unclear if the family is planning on shipping it but the following needs to be considered:</p> <ul style="list-style-type: none"> - shipping of an old and valuable grand piano will be very expensive - insurance costs will be very high - unclear at this stage if a grand piano is an exception to the Client Household Goods shipping policy (and the family have to pay themselves) - should there be damages (or even worse should the piano be destroyed) it is unlikely that repairs/replacement will compensate adequately (due to sentimental value) - a qualified grand piano tuner needs to be engaged (high costs) - Upon repatriation the same above issues need to be considered



Approach:	<p>Initiation Clear guidelines will need to be set for budget and policy exceptions (i.e. Grand Piano, health care, pet). Information about length of assignment and plans for after the assignment would be helpful to manage expectations. Number of authorised pre-move visits need to be clarified.</p> <p>Start Conversation</p> <ul style="list-style-type: none"> - Should be ideally held with Andre and Annette. - The main point of concern, the health options, need to be explored, explained and procedures set in place to accommodate a conversation and a visit to a consultant/specialist. A GP Doctor needs to refer a patient to an Asthma specialist (most GP surgeries run monthly Asthma clinics). A world renowned hospital "The Great Ormond Street Hospital" in London is known for their Asthma research. As per Relo Policy Client offers NHS plus private – details will need to be obtained from Client) <ul style="list-style-type: none"> - Bupa for example would have specialists in this area of expertise who can be contacted. - Will recommend to Andre and Annette to have medical patient notes translated into English - Timing for a pre-move visit needs to be arranged and planned in order to accommodate health specialist and school visits (before end of term end of June). - Travel plans for Andre should be explored to see if more than one pre-move visit is planned. - Question will need to be raised if Annette can make house selection without Andre's presence. - Schooling will be discussed in detail and established if professional Education Advice will be required (We would not offer this unless authorized by Client. If our risk assessment shows that clearly there is a need we would consult with Client first to seek approval.) - Housing options will be explained and compared to their current living arrangements. Expectations in terms of home sizes (e.g. if the Grand piano will fit), basement and garden will be managed. Parking will be discussed (permits and street parking) (e.g. costs for Parking Permit is not covered by Client, as per Relo Policy) - Suitable locations will be discussed to accommodate proximity from home to schools and transport for Andre to the Watford HQ. - Banking: will give and discuss various banking options for separate account set up prior to arrival - Shipment of Household Goods will be discussed (although we understand that the organisation will be handled from France) what is planned on being shipped, especially the Grand Piano (directives from Client). Question if a pet will be relocating to UK. - We will be talking about the French support groups available. - Any other concerns from the family will be addressed. <p>Bank Account A choice of banking will be explained and bank account set up documents will be sent and monitored.</p>
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Approach:	<p>Desktop School Search Information for "Lycee", "Ecole Primaire (Andre Malraux)" and "Ecole des Petits" will be sent, together with in-depth school details and information.</p> <p>Education Advice (if authorised) Depending on the length (and subsequent) assignment schooling might become a critical consideration. Céline age 4 can join a bilingual pre-school, however if the assignment length is for 4 years and repatriation after the UK assignment is likely (assumed), perhaps an all French School might be also a consideration. Should space in the Lycee be a challenge, an IB school might be the next best choice.</p> <p>Look See Visit (if authorised) Set appointments for school visits (if authorised by Client) Area overview for housing, school location proximity to housing, shopping, transportation, Martial Art clubs and schools, Musical schools, Dance schools, Art Centres etc. Public transportation will be explained and experienced. Should the three children visit with the parents considerations for the size of the car will need to be taken into account.</p> <p>Institute Francais A visit to this institute would be beneficial to show the family some of the support and networking groups available (music, art, children activities etc).</p> <p>Accompanied School Visits (if authorised) We will arrange the timely visits for an accompanied school visits. Note: Summer term finishes end of June.</p> <p>Home Search day one (follow up days if required) An in-depth search will list suitable properties, all matching the required budget and the family personal requirements with regards to the actual house. Our French Local Area Consultant meets the family and shows the pre-selected homes. We will test the distance and proximity from homes to schools and transport to Watford. Local area landmarks (i.e. gym, and social networking areas, special interest points for children) will be pointed out for orientation. Details about Congestion Zone, parking and parking permits in London will be explained. Follow up Home Search days might be required, especially if Annette needs to consult with Andre (who might not be able to join the pre-move trip) about selecting their home. Visits to schools before the end of term are likely to be too early for Home Search to be carried out at the same time.</p>
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<p>Approach:</p>	<p>Other services (as mentioned in Optional) Provided as authorised by Client</p> <p>Shipment of Household Goods upon repatriation Organised and managed in line with policy stipulations and as authorised by Client.</p> <p>Further recommendation We would strongly suggest providing a Settling In programme for Annette in order to have a gentle area familiarisation. Once all her children are at school she will most likely need a networking group to feel comfortable and to be introduced further into the French society in London.</p> <p>We would also recommend a Language Course for Annette – there is currently an allowance provided in the Relo Policy.</p>
<p>Reporting</p>	<p>Constant feedback In the situation of this family we feel that a risk assessment is important to ensure that the family’s needs and requirements are all met. The health for one of the boys and the support for Annette will be one of the key factors in making this a successful assignment. We would further suggest that continuous reporting to Client is imperative and that Client is flexible in the support services they offer.</p> <p>Reporting on milestones achieved (e.g. Look See, School Search, Home Search etc Reducing the cost of employee occupancy: Reduction in rent, deposit, letting agency fees Maintenance Issues, Help line Completion reporting to Client Monthly Reporting on costs (rent/utilities/council tax) Reporting on any Maintenance issues Reporting for P11D</p>
<p>Relo Policy</p>	<p>Shipment of pets Not covered by policy, if family would have pets – give relevant advice</p> <p>Pre-Move Visits As per Relo Policy pre-move visits only for assignee and spouse – if children need to visit for schools – authorisation by Client required</p>

